Strategic Planning in Education:

A Simple Guide for Leaders and Administrators

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Today's schools are faced with a complex and dynamic world being disrupted from everything COVID-related to changes in society and technology. School leaders need to help staff and students adapt and transform the traditional methods of the past into vibrant, challenging, and engaging environments that empower students to successfully take their place in society as adults. Given the mountainous challenges faced by schools everywhere, the path forward for developing and engaging in meaningful and productive strategic planning to improve performance is often difficult to navigate.

Many school leaders have mixed feelings about planning and are afraid that the exercise will consume resources and produce a document without driving desired results or improved behavior. Below are the key principles needed to improve the strategic focus of your team so that your planning effort results in real, measurable, and definable outcomes. The principles are organized around Strategy Management Group's (SMG) [Strategic Management Maturity Model](#) , a tool designed to assess an organization's ability to manage strategy.

Provide Strategic Leadership
Strategic leadership means helping your team look beyond the tactical day-to-day whirlwind of activities and focus on setting priorities and aligning energy and resources with common goals. Strategic thinking skills are needed to substantially contribute to critical leadership conversations around mission, vision, values, strategic themes/goals, and other high-level strategic elements. Leaders question assumptions and look at problems in new ways to create and articulate a vision for the future. Post-planning, senior leaders must go beyond simply supporting the strategy and drive the adoption and execution. Senior leaders must demonstrate command of the strategy management outputs and performance reviews to gain other leaders' buy in. Strong strategic management leads to increased employee empowerment and less "command and control" management.

Foster the Right Culture and Values
Most schools post a values statement with a list of virtuous words. What distinguishes maturity is the degree to which those values are communicated, understood, and practiced – by leaders as well as by all key stakeholders. Evidence of a strong workforce culture includes ownership that employees feel for the vision and values of the organization; participation in shaping the organization's culture; trust, transparency, and freedom to communicate with candor (as opposed to a culture of fear); and awareness and consistency of adherence to stated value s and policies.

Encourage Strategic Thinking and Planning
Strategy development is not a "cookbook" process. It is a challenging, heuristic task that requires strategic thinking. Strategic thinking involves several traits: a) the ability to use consistent definitions of planning terms and to understand their distinctions; b) awareness of the distinctions between project planning and strategic planning; c) the ability to discuss and describe items in plans at the appropriate "strategic altitude"; d) awareness of the dynamic system effects in organizations, such as delays and feedback; e) openness to new ideas and encouragement of creativity and innovation; f) openness of the planning process to a team of employees of various ranks and functions; g) degree to which alternative strategies and scenarios are considered; h) linkage of strategic planning to budgeting; i) ability to write and speak with clarity and simplicity.

Create Strategic Alignment

Alignment refers to the degree to which the organization's people and resources are focused on the strategy. The opposite of alignment is "chaos", where managers, programs and projects are aiming at different goals and there is lack of a common vision, leading to wasted energy, delays, conflict, and confusion. Features of the organization that can be aligned include: values, vision, mission, strategic plans, budgets, policies, procedures, functions, themes, objectives, information standards and organization structure. Alignment measures the degree to which: a) people at all levels are motivated by a common vision and strategy; b) people understand that supporting the strategy is their job; c) people are self-motivated, not merely by compliance to rules. When the organization pivots to strategy execution, leaders must align resources with strategic priorities, all while recognizing capacity constraints. Since a large portion of the staff is in the classroom or working on student-focused activities, fewer staff are available to execute strategic initiatives. This requires a strong approach to project selection and prioritization.

Measure Performance

Without performance measures, managers are "flying blind". Most organizations have learned to measure some things, either for operational performance or for compliance with requirements of outside stakeholders. Features to look for in strategic performance measures are a) measures derived from and aligned to the strategy, not just operations; b) measures that focus on outcomes and results, not just money spent, tasks accomplished, or outputs delivered; c) measures that are reported frequently enough to drive decision making; d) measures that are balanced and cover a range of different dimensions including not only financial data but also stakeholder satisfaction, internal process performance, and capacities of the organization. Good administrators use meaningful measurements to better understand whether strategies are working, whether programs, projects and services are effective, and whether employees' attention is focused on what matters most to success.

Improve Processes

One benefit of strategic management is that it helps us identify which processes are most in need of improvement based on their impact on strategic objectives. This informs the allocation of resources for planning improvements of the most strategically important processes in the near term and long term. Process improvement includes an assessment of a) the organization's knowledge about its strategically important work processes; b) how well these processes are being improved updated and documented; c) how efficiently these processes perform compared to industry benchmarks; d) skills, practices and technologies used to improve process quality and efficiency; e) knowledge of core competencies and capacities of the organization and how well they are employed in running the processes; f) the level of employee awareness of customers and their expectations; g) existence of contingency plans for future risks, such as disasters, funding shortages, and leadership succession.

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Embrace Stakeholder Collaboration

Getting everyone on the same page sounds simple enough, but the fact is that everyone has a different understanding of what the school is trying to accomplish and what the top priorities should be. Transparent, open, and honest communication is a key element in reaching a consensus and aligning as many as possible toward the same goals and outcomes. While the messiness of collaboration makes some administrators nervous, we highly recommend including as many key stakeholders in the process as possible. That means getting involved with your board, staff, students, parents, and the community. Community support can pay off exponentially for the collaborative leader. When you involve the community early in the planning process, the likelihood of developing a successful and community-backed plan greatly increases.

Conclusion

The potential for improving the strategic management of educational institutions in the PK-12 has never been greater. Public education in many parts of the United States is in crisis mode and still feeling the aftereffects of a pandemic and increased competition from private institutions as well as home schooling. Costs continue to rise and shortages in school personnel is a never-ending battle. While strategic planning is done to some extent by most schools, any school with an ambitious vision for success must also have a plan and a process to manage strategy execution. For more about these basic principles or our approach to planning and management, visit www.strategymanage.com.

About the Authors

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About Strategy Management Group

Strategy Management Group provides a full range of strategic planning, balanced scorecard, performance measurement (KPI & OKR), and strategy execution consulting, training, and professional certification services to public, private, and nonprofit organizations. Known also for our Balanced Scorecard Institute and KPI.org brands, we are headquartered in Cary, NC with offices in Washington DC, and San Jose, CA, as well as international partner offices on five continents. Visit: www.strategymanage.com for details.

About the Catalyst for Educational Change

Catalyst for Educational Change (CEC) is a consulting agency dedicated to challenging the status quo in the U.S. education system. We use continuous improvement practices and deep collaboration to help educational systems build internal capacity, create better outcomes, communicate with leadership, and re-think our children's futures. CEC works with school districts across the country to implement measurable social change. Our mission and vision direct us to work with organizations using a systems orientation process to help them build collaborative cultures, and equitable, evidence-based practices that empower adults and students to deepen their learning and thrive.