

OUTLINE STRATEGIC PLANNING FRAMEWORK

... for added value, can be followed in conjunction with *Planning for Performance: a guide to strategic management in schools*

PREFACE

As schools have become businesses in their own right, additional pressures have been exerted on senior management to pursue a planning process that goes beyond educational outcomes and provision to address future challenges such as financial sustainability, collaborative governance and resource management, markets and competitiveness and the innovative use of emergent technologies.

The framework that follows asks just some of the questions that the senior team will have to ask themselves as they prepare a plan that will address the demands of an increasingly well-informed community of stakeholders who will be concerned that education in school meets the rapidly changing needs of successive generations.

There are no right or wrong answers to the questions posed but suffice to say that the keys to the delivery of every strategic plan are an achievable vision of the school's future, its objectives and goals; the taking of the actions necessary to realise them; and the regular review, monitoring and updating of the strategies and plans that will deliver the vision.

AN OUTLINE FRAMEWORK

1. Executive Summary

- This should be crafted when the rest of the plan has been completed and documented and summarise its essential ingredients.;
- It should not extend to more than an A4 page and may be presented in bullet form so that it is easily absorbed by its readers;
- The summary, perhaps in conjunction with the full vision statement, should be able to be released as an aide memoire generally available to stakeholders.

2. Purpose of the Plan

- It is useful to remind the internal stakeholders ... the governors, managers, teachers and students ... of the purpose of creating the plan;
- The plan exists to provide a context for future decision-making and problem-solving.
- It is often tempting to allow decisions regarding matters for urgent resolution to step outside the boundaries set by the vision of the future and to make judgements that merely paper over the cracks of more deep-rooted issues such as bullying, ethnic inconsistencies and the like;
- We cannot, of course, create an exhaustive list here of the issues facing schools in the 2020s decade but the vision and plans to realise it will have implications not only for provision and pupil outcomes but the culture of the organisation, the way it is perceived beyond the school gates and the values and learning dispositions its alumni take with them.

3. The Vision

- This is the picture of the school as it will be in 3 to 5 years, the values and attributes that will characterise it and its place both in the community it serves and among the local, even regional, educational establishment;
- Characterisation should take the 'high ground', not become pre-occupied with the specifics underlying goals and objectives, but provide a compelling picture of a school ready to accommodate change and the challenges that accompany it;
- It should include matters related to sustainability, governance, health, welfare and well-being, curriculum and pupil outcomes;

4. Mission

- The Mission is a 'positioning' statement, laying out the strategies, goals and objectives that will drive the delivery of the vision and contextualising them to the present order of things;
- It is often helpful here to create a SWOT analysis ... a listing of current Strengths, Weaknesses, Opportunities and Threats. This will provide a framework from which key strategies, objectives and goals will become apparent;
- Some schools encourage contributions to the SWOT analysis from governors, teachers and students to great effect ... even suggesting that each group should create their own independently to input to the plan.

5. An Environmental Analysis

- At no time has this section of the plan been more pertinent as nations reel from the political, economic, social and technological implications of the Covid pandemic, climate change and globalisation;
- This may be pertinent but it is also critical to the viability of the strategic plan and its ability to address an uncertain future;
- It is not easy to compile either and each of the 4 PEST headings will require meaningful thought from across the school's internal adult community;
- Politically ... will there be changes of government and what will that mean for such as educational requirement and performance, governance, health and safety, resourcing and the like; Economically ... levels of independence, financial management, shared resources and collaborative working; Socially ... changes to such as catchment, ethnicity, local government, welfare, population age profiles, increased poverty; Technology ... influence of such as access to new and emergent technologies, availability of hardware, growth in blended learning, data security.

6. Product

- The character, personal values and educational outcomes of the children who will become the school's alumni and the curriculum to deliver both educational attainment and statutory requirement;
- Standards of achievement, personal attributes and qualities as learners;
- Extra-mural and out-of-hours activities together with performance objectives as appropriate;
- Opportunities for personal development across the employment spectrum.

7. Markets

This is an area of the plan that schools are much less accustomed to considering but in an age of construction, widespread house-building and community issues such as increased poverty, unemployment, drug and substance addictions, government concerns such as social distancing and the challenges of balancing economic growth with the management of health and welfare, it has become an important consideration.

- How will forthcoming intakes vary from those of the present?
- Will demand increase or decrease and how will the competition encroach on the territory we regard as ours?
- What implications do the local underlying social trends have for our future?
- How do we characterise the markets that we shall be called upon to serve? Will that mean that we need to revise our provision? What effect will the changes have on the support services that we shall need to offer to engage more widely with the less fortunate families?

8. Marketing

- How do we obtain, and maintain, competitive advantage?
- What form should our messaging to our target communities take?
- Does our communication with parents, prospects and the community at large need to change? If so, in what ways?
- Do we do sufficient to ensure that we are the school of choice to sources of student intake?
- How can we build better relationships with local employers and can they make a greater contribution to preparing our students for employment?

9. Operations and Delivery

Whereas strategic matters within the plan are about 'doing the right thing', the operational elements are about 'doing things right'!

- You won't need much help in ensuring that your policy statements and procedural documentation meet government and community requirement because the majority you need will be in place already;
- This is where you should signal changes you intend to make to your ways of working;
- It should include a 'process route map' and as well as making an appropriate Curriculum Statement, outline a Scheme of Work and provide your approach to course planning and the way in which you expect teachers to develop their plans.

10. Accommodation

- Proposed new build;
- Refurbishment of existing buildings;
- New facilities;
- New equipment and major replacements.

11. Investment

- Applications for grants or additional funds for specific purposes;
- Fund-raising targets.

12. Organisation, Structure, People and their Development

- **Organisation and Structure** ... an organisation chart which shows how the school will be organised with criteria for decision-making, management responsibilities and accountabilities in summary.
- **People and their Development** ... workplace culture and values, the adult curriculum and access to it, CPD and qualification and availability of external course programmes, funding.

13. Objectives, Strategies and Action Plans

- A tabular presentation of the principal objectives of the plan and the strategies and actions that will be required if those objectives are to be delivered;
- The table should include identification of those who will be the project leaders/managers and the timelines for completion, perhaps with progress milestones for senior management review.

14. Financials

A summary of the principal elements of the financial plan. This is also a section of the strategic plan that is likely to come under public scrutiny ... and not just by government representatives.

15. Critical Success Factors

This should include such as:

- Meeting student outcomes in attainment, learning dispositions and key planning deliverables;
- Staff retention and development;
- Addressing outstanding challenges to student welfare and school cultural inadequacies;
- Student and parental satisfaction;
- Community engagement.
- Communication and market research.

16. Key Risks and Contingency Plans

Another tabulation with the risks to the plan highlighted in red for severe, requiring a managed plan in its own right; amber for medium risk but still requiring concerted action; and green for low risk but action a much lower priority. Every risk identified should carry a contingency plan for immediate action should mitigating activities be found to fail and the worst to happen.

17. Monitoring and Updating

- a single page 'Dashboard' that highlights those measures that can be used to follow progress in meeting those objectives and targets that will demonstrate that the strategic plan is a live document and in hand;
- major update at six months with a full annual review and revision.