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Strategic Planning Guide for Education



Advisory Services



When people think about the concept of strategic planning, they frequently envision a calendar of never-ending meetings, innumerable rounds of modifications to objectives and methods, and, eventually, a strategy that is not always completely fulfilled.

The practice of strategic planning in education is not just predicated on acquiring new clients, increasing market share, or surpassing financial goals. Instead, strategic planning in education has developed into a tool to unite the whole community behind improved student results. This is an important function of modern strategic planning in education.





What is Strategic Planning in Education?

In its most basic form, strategic planning may be seen as the process of establishing objectives, deliberating on the steps to take in order to reach them, and organizing the resources required.

Although strategic planning in education was first derived from the commercial world as a result of individuals migrating from the private sector into educational leadership roles, many of those planning tools and paradigms have since been modified to place a greater emphasis on community involvement and consensus.

Strategic planning is now used by educational institutions of all sizes, with the overarching purpose of achieving the broad objectives of enhancing student outcomes, adapting to changing job markets and career aspirations.

The leaders of the highest-performing schools have deliberately modified the method through which they

carry out their strategic planning in order to more authentically incorporate and include parents and other important constituent groups.

They are well aware that the likelihood of their strategic plans succeeding is significantly reduced in the absence of support from the community, not to mention the insights that can be gained through the lens of community involvement. There are a number of approaches that may be taken when it comes to strategic planning in education. These approaches vary based on the objectives of the school, as well as the requirements of the community that the school serves. Defined models provide for a useful jumping off point, but it is advised to use an iterative approach in order to zero in on the solutions that are most applicable to your educational institution.



Strategic Planning Process

The strategic planning process elucidates the methods of monitoring and control that will be used to direct the execution of the plan. In most cases, the final responsibility for the strategy rests with the Board of Directors of the educational institution. It is the responsibility of the management teams, which are typically comprised of the Dean, the Managing Director and the Operations Directors, to put the plan that has been established by the Board into action.

The strategic cycle is broken up into two major stages: the first stage is the creation of the strategy, and the second stage is the execution of the strategy. A strategic cycle will typically last for a period of eight to ten years, and it will be taking place around halfway through the cycle. This approach increases the likelihood that the strategy can be ambitious, while also allowing for sufficient flexibility to include new components based on the constantly shifting environment.





Define the Vision, Mission & Values

The formulation of the organization's vision, mission, and values comes first, followed by the formulation of its strategic plan. As soon as they have been validated, they will give a framework for the process of developing strategic axes, as well as lead the execution of strategic planning.

The values foster company identity and a feeling of belonging to the community, while the vision gives a broad direction for the strategy to follow. The mission articulates the essential elements of what the school's intends to do.

The establishment of a strategic framework relies heavily on this set of components.

Analyze Environmental And Internal Factors

Several studies of the institution's internal as well as its external contexts serve as inputs for the creation of the strategy.

A strategy that consists of "development / refreshment" needs to be based on several factors, including competitive analysis, industry insights, market insights, buyers' value, and the evolution of the student body, the political and economic environment—such as regulatory changes—any significant disruption in the market, or even important social, cultural or demographic changes in society.

In order to assist in the creation of the strategy by the Board of Directors, the management team (including at least the managing director, the dean, and the directors of finance and operations) is responsible for gathering inputs from both within and outside the educational institution and coming up with recommendations that will eventually become a part of the strategic axes.

Propose Strategic Axes

Next, the management team will propose strategic development axes and objectives combining insights from the analyses of environmental and internal factors, with their practical knowledge obtained from operating the school. These strategic axes should be clearly aligned with the mission of the school and support the progress towards achieving its vision. The suggested strategic axes and objectives, in addition to pertinent facts about the company, are detailed in this document.



Refine and Validate the Strategy

The Board of Directors is then presented with the strategic plan that has been drafted.

After the plan has been validated, it is included in the risk management model and then put into action.

Dashboards for risk management are configured based on the strategic framework and goals that have been established. Should a substantial change in the environment provide an unforeseen opportunity or risk of large relevance at any point in time, the risk management process has the ability to immediately trigger a modification of the plan.

In order to keep all of the stakeholders up to date on any modifications or new developments to the strategy, a communication plan is prepared in tandem with the developing strategy.

Define The Targets And The Implementation Steps

Once the strategy has been approved by the Board, a plan for its execution is prepared. The implementation plan is composed of a sequencing of the many actions supporting the strategy, in addition to milestones, as well as a breakdown of the strategic goals into monthly and/or yearly targets. The Key Performance Indicators (KPIs) can then be defined.

It is the responsibility of the Managing Director to ensure that the strategy is carried out in accordance with the primary milestones and adjust the implementation plan accordingly. The Key Performance Indicators play an essential role in informing the Management Team's decisions.

The Managing Director prioritizes the actions in support of the strategy and breaks down the strategic objectives into operational targets. The actions are grouped into functional plans, such as a communication plan, a financial plan, an academic plan, a staffing and faculty development plan.

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Align The Management Around The Strategic Vision

After that, the Managing Director will compose individual mission letters for every member of the leadership team. In most cases, a comprehensive conversation about the mission letter is conducted with each manager to ensure that they fully comprehend what is expected of them, that they are aware of how the directives connect with the mission, vision and strategy.

The strategy, together with the vision, purpose, and values, is communicated to the staff, professors, and students of the institution via the distribution of a Strategy Kit. In addition, an information session that allows participants to ask questions is also planned and scheduled.

New faculty members are also given a presentation and explanation of the approach at the beginning of the academic year or at welcome presentations that are arranged upon their arrival.

The community is kept up to date on the progression of the strategy at regular intervals during its execution via the use of a variety of information dissemination methods, such as newsletters, information sessions or community meetings.





Implement The Strategy With Department Plans

The majority of the institution's daily operations are directed by the strategic plan.

The strategic plan serves as the compass that directs the execution of the strategy, which is then carried out via day-to-day operations as well as the creation of strategic initiatives at the department level.

The process of financial planning and budgeting plays a crucial function in establishing alignment with the strategy and ensuring the strategy is successfully executed by allocating resources to the different departments and initiatives. The distribution of resources happens on the basis of the existing finances as well as projections of future financial performance.

This is an annual procedure that involves negotiating with the leaders of the departments in order to assess their requirements for day-to-day operations and to rank the projects in order of importance.

Monitor the implementation of the strategy and review the department plans

Throughout the course of the year, both the key performance indicators and the progress made on departmental goals are subject to routine monitoring. The monitoring of opportunities and risks might disclose one or more significant developments in the environment of the educational institution. This change is something that

should constantly be conveyed to the management of the organization.

Consequently, during the course of the year, the execution of the plan will be modified in response to these inputs. The Board of Directors evaluates any substantial risk or opportunity, including any large departure from the KPIs, and then makes a decision about whether or not a prospective adjustment of the strategy should be implemented.

The plans of each department are examined on an annual basis as part of the management review process, which takes place in advance of the annual meeting of the Board of Directors.

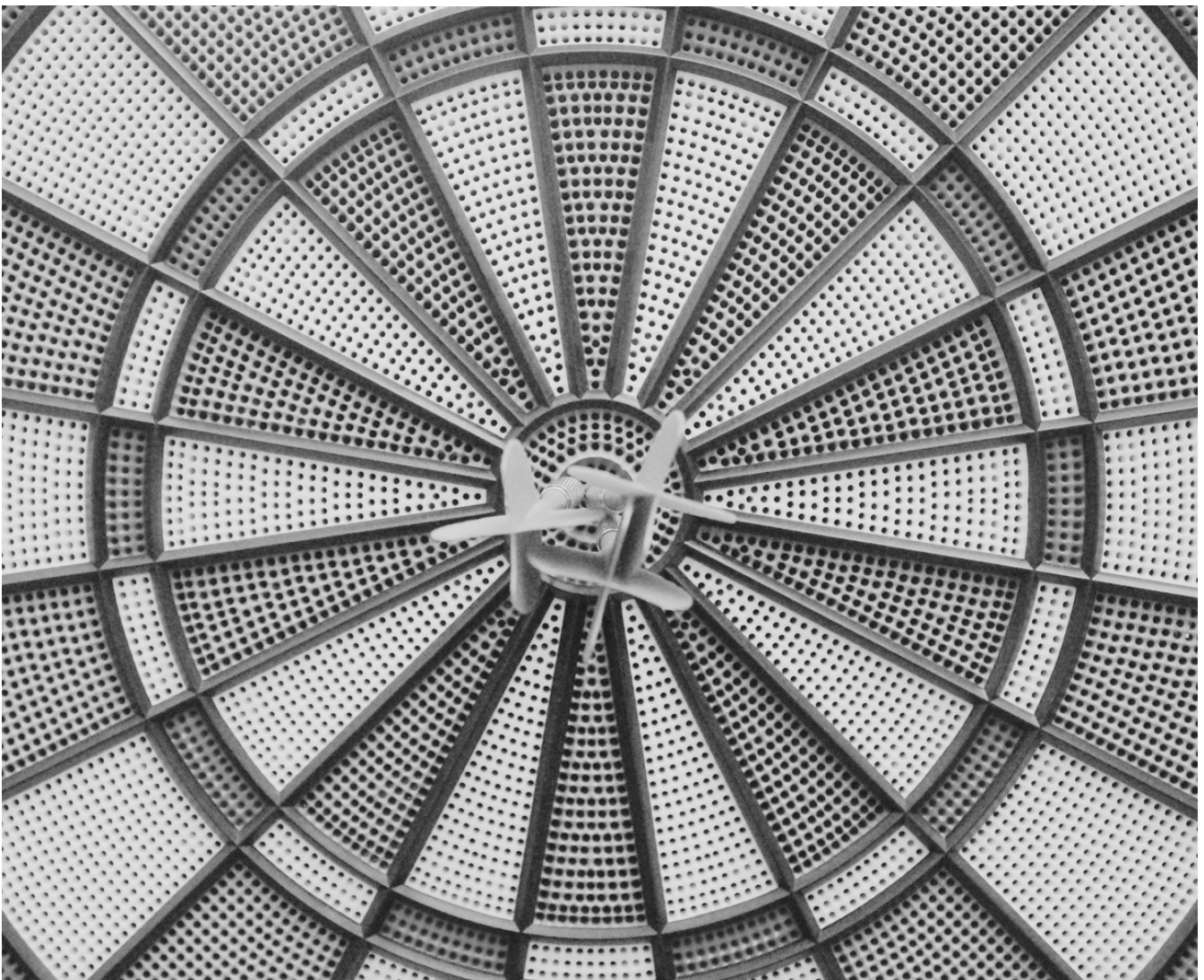
Plans for individual departments may be revised on a more regular basis, for instance in the case of a shift in the circumstances of the market or a departure from the outcomes that were anticipated.

In the meantime, an update to the financial plan will be made to take into account the increased investment needs as well as the re-allocation of resources to other parts of the educational institution that are considered to be lower priority.

During the meeting that the Board holds at the end of each year, both the yearly strategic objectives and the budget are reviewed and approved.

Through the yearly objectives that are set for staff assessment and performance monitoring as well as the faculty performance evaluation, the annual goals of the plan are also broken down into more granular, individual goals for each member of the staff and faculty.

The planning process itself is also reviewed on a yearly basis. The Managing Director solicits input from all parties engaged in the strategic planning processes, feedback and changes to both procedure and process.



Suggestions to Help You with Your Strategic Planning

1. Get Everyone on the Same Page

Divergent conceptions of what constitutes strategy are capable of derailing even the most well-laid plans. Therefore, the first stage in the process of developing a good strategic plan is to ensure that all parties involved are on the same page on the planning model to use.

Investigate the various formats for strategic business plans, in order to construct your own, and then prepare a document titled "terms of reference" to assist you in aligning all of your important stakeholders. A useful piece of advice is to go beyond just disseminating the strategic approach and terms of reference by including stakeholders in conversations in which they explain the key elements of the plan. This will guarantee that all parties comprehend the plan and are on board with it.





2. Be a Collaborative Leader

The return on investment for every minute and every cent spent cultivating community support is exponential. It is disturbing because a study from the year 2020 found that fewer than forty percent of the instructors polled said that strategic planning was a group endeavor in their respective schools.

Collaborating to generate new ideas and formulate a strategy that can be implemented is really important. After the pandemic, specialists have advocated for more student participation in the formation of school culture and decision-making by drawing on the experiences of previous crises that occurred in Japan and New Zealand. They argue that collaborative decision-making is especially beneficial to disadvantaged groups, and given that home-schooling has increased the opportunity gap, this will become an increasing concern for many educational leaders.

To enable co-creation, explore the use of technology that may facilitate scalable, real-time dialogue in a way that is both safe and inclusive for students, teachers, and any other groups who are considered stakeholders.





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3. Engage Your Community Early and Often

It is quite beneficial to have an understanding of the preferences of your community. Make sure that you adopt a broad definition of your community, from your local environment, to your alumni and industry partners. Schools that include their community early on in the planning process have a far better chance of developing a plan that is well received. The earlier you can engage your community, the more support you will have later on in the strategic process.

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Ready to start your Strategic Plan & insure your institution stays competitive?

We educate and
accompany your teams
through the process.

Get Personalized
Advice

Discover our
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toolkit



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