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***Strategic Planning-An Imperative Procedure for Educational Leaders to Employ***

Strategic planning is a process that educational leaders must utilize to allow the organization to make its vision come into fruition. Bryson asserts that leaders must be masterful in this process to allow the organization to “. . . fulfill (its) mission, meet (its) mandates, and satisfy (its) constituents in the years ahead.” (Bryson 1995, pg. ix) Strategic Planning is most successful when stakeholders adhere to the tenets outlined in Strategic Planning Theory. Oftentimes, shortcuts may impede the full benefits of the process. Educational leaders must work in a way that does not allow the process to be compromised.

Strategic Planning is best described as “. . . a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it.” (Bryson 1995, pgs. 4,5) Strategic Planning is a succinctly defined method where stakeholders work collectively to list the circumstances that must be in place to allow the organization to maximize its effectiveness. The strategy involves: “. . . effective information gathering, development and exploration of strategic alternatives, and an emphasis on future implications of present decisions.” (Bryson 1995, pg. 5) Another important aspect of “strategic planning is environmental scanning. In environmental scanning, leaders assess threats and opportunities in the external environment.” (Bamberg, R. & Layman, E.J. 2005) Bryson also mentions that strong

leadership is needed to facilitate this process as “. . . strategic planning is not a substitute for leadership.” (Bryson 1995, pg. 9)

The Strategic Planning Theory describes the ideal scenario to accomplish planning strategies successfully. As one observes, it becomes apparent that theoretical and practical applications do not always coincide. A recent class assignment has revealed the reality of this discovery. After Cohort III of the Doctoral Program of Educational Leadership at Prairie View A&M University was assigned to complete the following task:

**Instructions:** Please stay within these guidelines, using the exact wording. You may follow up on a question if there is information that you feel would be helpful your fellow doctoral students in understanding the reality of the strategic planning process.

*Suggested Opening: “Thank you for your this ( morning). I have a few questions about experiences with strategic planning in your organization that I would like to ask you.”*

1. What does your organization do?
2. What is your position in the organization?
3. Has your organization ever engaged in strategic planning? *<Pause, wait for response which should be “yes”*
4. Who was involved in the strategic planning process?
5. What led to the decision to use strategic planning within your organization?
6. What kind of training did members of the organization receive before beginning the strategic planning process?
7. How long did the planning process take?
8. Did the process go smoothly?
9. Did any unexpected issues or problems emerge during the strategic planning process?
10. What did you learn about your organization from engaging in strategic planning?
11. Did this process reveal anything about your clients and competitors?
12. What changes or decisions occurred as a result of this process?
13. Did you feel that the strategic planning process was useful and helpful?
14. Would you use strategic planning again? Why or why not?
15. What would you do differently next time your organization engages in strategic planning?

*“Thank you for your time.”* (Herrington 2006)

The observations demonstrated various applications of strategic planning process:

## Strategic Planning Interview Coding Assignment

### 1. What does your organization do?

Public Entity	2
Higher Education	3
Non Profit	6
Government Agency	2
Public School	3
Business	4

### 2. What is your position in the organization?

Executive Officer	7
Program Director	4
Administrator/Specialist	3
Church Official	3
Field Worker	3

### 4. Who was involved in the strategic planning process?

Internal constituencies	12
External constituencies	0
Both internal and external constituencies	7
One individual	1

### 5. What led you to use strategic planning in your organization?

Response to consumer need	5
Executive mandate	4
Growth	2
Need for organizational plan	5
Transitional/New Direction	

### 6. What kind of training did the participants receive?

None	13
Consultant/Facilitator	3
Conferences	1
On-the-job	3

### 7. How long did the process take?

On-going	9
One year or less	6

More than one year 3

8. Did the process go smoothly?

Yes 9

No 2

Experienced some challenges 8

9. Did any unexpected problems or issues emerge during the strategic planning process?

yes 14

no 4

Personnel 2

Change process 3

Lack of exposure 1

Environmental conditions 2

Communications 2

Alignment with vision 2

Technology 1

Funding 2

10. What did you learn about your organization from engaging in strategic planning?

Documented organizational strengths 5

Documented organizational weaknesses 6

Recognized opportunities 3

Valued the importance of the process 4

11. Did the process reveal anything about your competitors?

Yes 12

No 2

Somewhat 1

Not applicable 4

12. What changes or decisions occurred as a result of this process?

Programming Changes 5

Planning Tools (Laying Framework) 4

Communication 2

Effective Education Facility 1

On-line Presence 1

Effective Instruction 2

Re-evaluation of plans and procedures 2

Restructuring 2

13. Did you feel that the strategic planning process was useful and helpful?

All yes (tallies not included)

14. Would you use strategic planning again? Why or why not?

Accountability	1
Operating procedures	7
Results	3
Communication	1
Goals	3
Successes	1
No Answer	4

15. What would you do differently next time your organization engages in strategic planning?

Evaluation	1
Communication	2
Participation	6
Procedures	4
Organization	3
No Answer	4

(Herrington 2006)

The members of the Cohort interviewed leaders in a variety of fields and/or industries. The findings revealed that in theory the Strategic Planning process should involve all stakeholders. In some cases in practical application, the process was limited to only a few perceived key individuals.

The results demonstrated that a number of stimuli served as the catalyst for this process to be utilized in the organizational structure. Theoretical practical calls for members to be trained and practical application revealed that some individuals in organizations learned the process as they were engaged in the process. The planning process varied by organization. Consistent with theory, many organizations did experience challenges and there were unexpected issues.

In line with theory, participating individuals were able to glean a great deal of insight regarding facets of their organization as well as characteristics about the clients and competitors.

Consistent with theory, most felt positive changes and decisions occurred as a result of the process and the decision to continue the process received positive support. There was also a huge consensus that the process could be improved.

In conclusion, Strategic Planning is a method that educational leaders may use to shape the organization as it works to make its vision a reality. Strategic Planning is most successful when leaders facilitate and involve stakeholders. Peter M. Senge shares his insight regarding this concept: “. . . shared vision changes people’s relationship with the company. . . A shared vision is the first step in allowing people . . . to begin to work together.” (Senge 1990, pg. 194)

## References

1. Bamberg, R. & Layman, E.J. (2005). Environmental scanning and the health care manager. *The Health Care Manager*. 24, 200-208.
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- 5 Senge, P. (1990). *The fifth discipline: The art & practice of the learning organization*. Santa Fe, New Mexico: Doubleday.