

# The features of an effective school strategic plan: Literature review

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AERO acknowledges the traditional custodians of the lands, waterways, skies, islands and sea country across Australia. We pay our deepest respects to First Nations cultures and Elders past and present. We endeavour to continually value and learn from First Nations knowledges and educational practices.

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# Contents

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Executive summary	4
Introduction	5
The four stages of a school strategic planning cycle	5
Method	6
Why school strategic plans matter	7
Constructing an effective plan	9
Compelling mission and vision statements	9
Specific, sharp and select goals, approaches and practices	10
Content of goals, approaches and practices that is aligned with the evidence base	11
Defined processes for monitoring and evaluation	11
Coherence within and across documents	12
Summary of key features of effective school strategic plans	13
Conclusion	13
References	14

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## Executive summary

School strategic plans refer to multi-year and annual plans produced through regular school review cycles. These plans communicate a school's intentions for improvement and are often created in consultation with the school community and, where relevant, system-level staff who work directly with the school in a support role. Following their creation, school strategic plans can then be shared with key stakeholders (such as students' parents or carers).

Research suggests that simply having a plan isn't enough – the *quality* of the plan also matters. Higher-performing schools tend to have higher-quality school strategic plans. Research suggests that plan quality is positively associated with student performance and achievement.

AERO conducted a [literature review](#) to understand **the features of an effective school strategic plan**. The findings from this review informed a suite of practice guides AERO produced to support school leaders to develop and apply effective school strategic plans.

Some key findings from this literature review:

- Research on the features of effective school strategic plans in the Australian context is limited. This literature tends to be focused on the United States (US) context and situated in grey literature (for example, frameworks developed by education research institutes) rather than primary research.
- We cannot presume a linear relationship between school strategic plans, actions and outcomes. However, we also cannot presume plans don't matter. School strategic plans provide insight into the aspirations and intentions of schools, which in turn influence actions and outcomes. Research suggests there are generally positive, reliable relationships between planning, application and measuring performance, although the exact causal mechanisms of this relationship are not clear.
- Overall, the features of an effective strategic plan are:
  1. Compelling mission and vision statements
  2. Specific, sharp and select goals, approaches and practices
  3. Content on goals, approaches and practices aligns with the evidence on 'what works' for school improvement
  4. Defined processes for monitoring and evaluation that are data-informed, and contain clear performance measures and time frames
  5. Coherence within and across documents (for example, across multi-year and annual plans).



## Introduction

An effective school strategic plan (or school improvement plan or agenda) is a critical part of school improvement. School strategic plans refer to multi-year and annual plans produced through regular school review cycles.

School strategic plans communicate a school's intentions for improvement – including what can be better, how this can be achieved, and how progress and outcomes can be assessed. They serve as a 'deliberative, disciplined effort to produce fundamental decisions and actions that shape and guide what an organisation (or other entity) is, what it does, and why' (Bryson, 2011, pp. 7–9). They are often created in consultation with the school community and, where relevant, system-level staff who work directly with the school in a support role. Following their creation, school strategic plans can then be shared with key stakeholders such as students' parents or carers.

An effective school strategic plan is defined for the purpose of this work as one that supports schools to improve outcomes. While we cannot presume a linear relationship between school strategic plans, actions taken and outcomes, the research broadly shows that school strategic plans matter. As such, it is important to identify the features of effective school strategic plans when investigating school improvement, and to inform policy and practice on this topic.

Accordingly, AERO conducted a literature review to understand **the features of an effective school strategic plan**. The findings from this review will inform a suite of guides AERO will produce to support school leaders to develop and apply effective school strategic plans.

## The four stages of a school strategic planning cycle

This section outlines the 4 stages typically described in a school improvement planning cycle (DuFour et al., 2010; Hargreaves & Hopkins, 1991).

- **Stage 1. Preparation for construction:** This involves understanding the current state of the school (for example, levels of student learning) via an audit. It also involves understanding the factors that impact the state of the school, related to the internal environment (for example, school demographics and workforce trends) and external environment (for example, education policy trends) (Knight, 1997).
- **Stage 2. Construction:** This relates to the development of plans and their constituent parts. While varying names are given to the different parts of school strategic plans, most literature identifies these parts as: vision and mission statement; goals; approaches and practices; and processes for monitoring and evaluation (Knight, 1997). This stage relates to conceptualising, organising and writing up these constituent parts into a plan.
- **Stage 3. Application:** This is the stage at which the organisation (for instance, schools), teams within the organisation and individuals work with any additional stakeholders to put the school strategic plan into practice.<sup>1</sup> This involves developing incentives, support and accountability structures, and actioning approaches set out in the plan, drawing on available resources (Deeble et al., 2019).
- **Stage 4. Evaluation:** This relates to reflecting on and monitoring the impact of changes to identify the extent to which goals were achieved, and applying this knowledge to the next cycle (DuFour et al., 2010).

<sup>1</sup> The literature on school strategic plans often refers to Stage 3 as the 'implementation' stage. We have used the term 'application' to avoid confusion given that implementation processes themselves involve multiple stages, including preparation and ongoing monitoring (Deeble et al., 2019).

**This literature review will focus on the key artefact of the construction stage (Stage 2) of the school improvement planning cycle – that is, the resulting school strategic plans.**

A focus on the construction stage helps schools understand how to construct an effective school strategic plan – the focus of this work.

While not the focus of this literature review, it is worth noting that there is significant literature available on the 3 other stages of the cycle.

For example, the research describes:

- processes that organisations should take to prepare to construct the plan, such as stakeholder consultation (for example, Elbanna, 2008)
- application of school strategic plans, such as research highlighting the conditions for and barriers to effective implementation of plans (for example, Elbanna et al., 2016)
- how to carry out an effective evaluation of school performance (for example, Centre for Education Statistics and Evaluation, 2015).

As mentioned, the construction stage involves developing the different components of strategic plans: vision and mission statements, goals, approaches (curriculum, pedagogy and assessment approaches) and practices (which indicate how an approach is to be applied), and monitoring and evaluation processes.

While the construction stage involves consideration of the substantive content of the strategic plans (for instance, the specific pedagogies a school might use), this literature review does not focus deeply on the substantive content of plans – noting that there is already a large ‘what works’ evidence base in school improvement literature. This is further discussed in the section ‘Constructing an effective plan’.

## Method

To conduct this literature review, we undertook searches on the EBSCOhost, Informit and Google Scholar databases, using the following terms, including different combinations of these terms: ‘strategic planning’, ‘strategic plan’, ‘strategy’, ‘school improvement agenda’ and ‘school improvement’.

Results of this search included:

- grey literature that draws on research to identify features of effective plans and provided guidance for school strategic planning (for example, frameworks developed by education research institutes)
- empirical qualitative research that employed documentary analysis methods
- empirical quantitative research that mapped out correlations between quality of school strategic plans and organisational performance
- theoretical literature that drew on empirical research and discussed implications for particular organisational theories.

Given the overarching research question, which focuses on the construction of school strategic plans, our interest was mainly in empirical qualitative research and grey literature that draws on this research. We drew on the other 2 result types (quantitative and theoretical research) to provide context around the significance of school strategic plans, and stages in the school improvement planning cycle respectively.

Furthermore, there is more research on strategic plans in public management and organisational effectiveness literature, compared to literature in the education context. While we drew on the public management and organisational effectiveness literature to a degree, we foregrounded the educational literature to make it relevant to a school context.

Results were organised and saved into folders within the Zotero reference management software. Both academic and grey literature were identified through this process. After identifying relevant results, we read, took notes and synthesised findings into this report.

## Why school strategic plans matter

The relationship between quality strategic plans and organisational effectiveness (whether organisations have achieved defined goals) is generally described as positive and reliable (Bryson et al., 2018).

Education research also suggests that school strategic plan quality is positively associated with student performance (Fernandez, 2011; Caputo & Rastelli, 2014; Huber & Conway, 2015). In particular, Fernandez (2011) found that even when controlling for various factors, there is a consistent, strong correlational association between quality of plans and overall student performance in maths and reading. School strategic plans can provide a clear framework that organises and rallies school communities around a common set

of goals and practices – a factor that is crucial for successful school reform (Doss et al., 2020).

It is important to note that while the literature suggests a generally positive relationship, measuring this relationship is not straightforward. For instance, a [meta-analysis](#) of 31 studies spanning 9,000 public and private sector organisations (George et al., 2019) concluded that while strategic planning works in achieving predetermined goals, many studies are correlational rather than causal in nature. As such, most studies suggesting a correlation between planning and performance would be at Level 2 (Medium confidence) or below according to AERO's [Standards of evidence](#).<sup>2</sup>

Furthermore, Bell (2004) describes the assumption that we can improve schools through school strategic planning as a 'predictive fallacy' since we cannot predict, understand or control the future. Mintzberg (1994), another critic, argues that school strategic plans simplify reality and form a tick-box exercise that hinders true innovation.

Nevertheless, while it is wrong to presume a straightforward relationship between plans, actions and outcomes, it is equally wrong to conclude that nothing is, can or should be planned (Knight, 1997). The rest of this section explores the features of strategic plans that the evidence suggests might matter to improving outcomes, before the rest of this literature review expands on these features.

There are 2 pieces of academic research that are particularly relevant in terms of identifying the key features of quality school strategic plans.

<sup>2</sup> George et al. (2019) note that most of the correlations estimated are products of cross-sectional surveys where information on both the independent (school strategic planning) and dependent (organisational effectiveness) variables is elicited from respondents within organisations. As the measurement of both variables is contemporaneous and subjective, and there are likely to be confounding variables that go unobserved, the correlations estimated may not reflect the actual impact of school strategic planning. George et al. (2019) advocate for the use of [experimental](#) and [quasi-experimental](#) methods to be applied to develop a more robust body of studies for future [meta-analyses](#). Such methods would lead to studies that may be categorised as Level 3 (High confidence) or 4 (Very high confidence) in AERO's [Standards of Evidence](#). Until this occurs, the robustness of the quantitative literature in this field is weak and should be viewed as suggestive only.

Fernandez (2011) explored the relationship between elements of school strategic plan quality and school performance in the US context. Fernandez drew on a school strategic plan scoring rubric designed by experienced superintendents who developed this rubric for Clark County School District (and for wider use across North America), based on school improvement templates commonly used across the US and Canada, and on literature on best practice.

Fernandez's study drew on a Clark County School District dataset, which included data on student scores, and data on school demographics and resources, as well as a content analysis of each school's strategic plans. The analysis of each school's strategic plan drew on the rubric to work out a 'quality' score for strategic plans from 303 schools. Each plan was given a score ranging from 1 (lowest) to 3 (highest).

Fernandez found that when using this rubric for quality school strategic planning, even when controlling for a variety of factors, there is a strong and consistent association between the quality of school planning and overall student performance in maths and reading. This suggests that features included in the rubric are relevant for learning outcomes.

Carvalho et al. (2022) aimed to identify features of quality school strategic plans. Features were identified based on a review of educational literature, government guidelines and a preliminary analysis of school strategic plans in the Portuguese context.

Carvalho et al. (2022) and Fernandez (2011) identify strong similarities in the features of quality school strategic plans in their studies, including:

- a comprehensive, integrated and coherent plan
- Specific, Measurable, Achievable, Relevant and Timely (SMART) goals
- explicit monitoring and evaluation processes.

Additionally, both studies emphasise the importance of using evidence-informed approaches or strategies for improvement, professional development, and parental and community involvement. These indicators are deemed to be part of the content category, and will not be discussed in this review.

Given these studies were conducted in different contexts (Portugal and the US, respectively), these findings are likely to have applicability beyond these 2 contexts, including in Australia.

The rest of this literature review draws on features from Carvalho et al. (2022) and Fernandez (2011), as well as US grey literature (for example, frameworks designed by education institutes) – and to a lesser extent, public management research and other works. From the literature, this review identifies and examines the evidence for key features of effective school strategic plans.

While more [primary research](#) (that is, the collection and analysis of evidence that hasn't been collected before) is needed to understand how specific features of school strategic plans relate to effectiveness (George et al., 2020), the remainder of this review unpacks the most strongly evidenced features of effective plans.

## Constructing an effective plan

Effective school strategic plans are comprehensive. They should include explicit mission and vision statements, goals, approaches and practices, and defined processes for monitoring and evaluation. The value of comprehensive coverage of these components is highlighted in multiple studies across public management literature (e.g., Bryson et al., 2018), and school improvement literature (Carvalho et al., 2022; Fernandez, 2011; Knight, 1997).

From our review of the literature, the key components of a comprehensive plan include:

- **mission and vision statements:** the school's purpose and preferred future
- **goals:** an aspiration for improvement in a learning area (synonymous with 'priorities' in the literature)
- **approaches:** curriculum, assessment and pedagogy methods selected to achieve a goal (for example, an assessment approach could be [formative assessment](#))
- **practices:** underpin an approach, and indicate how this approach is applied (for example, if a prioritised assessment approach is formative assessment, a practice underpinning this approach could be to improve staff's ability to provide timely feedback linked to formative assessment)
- **monitoring and evaluation:** how the school intends to track progress to goals, and adapt plans based on its progress.

What the research suggests regarding the effective construction of these components will be explored further in the following sections.

## Compelling mission and vision statements

Plans should begin with compelling mission and vision statements. The former reveals a statement of purpose for a school's existence, while the latter provides insight into a school's preferred future (Gurley et al, 2015). In *Strategic planning for school managers*, Knight (1997) argues that 'a failure to define and redefine the fundamental *raison d'être* [reason for existence] for any organisation makes probably the most significant contribution to that organisation's ultimate failure'.

The literature suggests that mission and vision statements should be compelling and unifying, and appeal to school staff, students and the wider school community (Gurley et al., 2015). These statements should be clear and sharp. According to Knight (1997), they should not be sprawling, catch-all statements with long-winded, complex phrasing, but rather focus on fundamentals, which, in the case of schools, is learning.



## Specific, sharp and select goals, approaches and practices

Following mission and vision statements, effective school strategic plans prioritise specific, sharp and select goals, and associated approaches and practices to realise these goals.

Goals should be aligned with need.

The literature suggests the importance of continuity and alignment between school needs and school goals (Knight, 1997). The weighted importance of this in an Australian context is demonstrated through the Australian Educator Awards, which signify one of their 4 criteria for Best School Strategic Plan as ‘Demonstrated strategic development of the plan to ensure it meets defined school needs and business objectives’ (Australian Educator Awards, 2022).<sup>3</sup>

During the preparation for construction stage, school leaders consider the opportunities and challenges their schools face and in turn identify their school strategic plan’s areas of focus (Knight, 1997). In effective plans, school leaders connect this focus with the sequence of goals, approaches and practices required over the medium- and long-term to achieve change. The resulting artefact of effective school strategic plans should reflect goals, approaches and practices that are specific, sharp and select.

The term ‘**specific**’ refers to the avoidance of generalisations. School improvement experts recommend ‘highly specific plans that focus on what tasks will be accomplished and who will accomplish them’ (Hanover Research, 2014). Plans should ‘avoid speaking in vague terms, such as ‘[w]e will roll out professional learning communities by subject area’, and opt for more defined action items’ (Hanover Research, 2014).

Balanced attention should be given to the scope of actions described in a plan, to ensure that the list of intended actions is not so highly specified and complex that it risks overwhelming the staff responsible for operationalising a plan (Hanover Research, 2014).

The term ‘**sharp**’ refers to the clarity of content. Existing literature highlights that goals, approaches and practices should not be overly complicated (Knight, 1997). Instead, there should be a focus on what is most important to the school, which also links to the importance of goals, approaches and practices being ‘select’.

The term ‘**select**’ refers to the quantity of improvement priorities identified in school strategic plans. There should not be too many goals, approaches and practices. An Evidence for Learning Guidance Report (2019) noted ‘Schools should probably make fewer, but more strategic choices, and pursue these diligently’ (Deeble et al., 2019).<sup>4</sup> A Grattan Institute report (Hunter & Sonnemann, 2022) highlighted the ‘importance of setting formal improvement priorities’ which were specific and clear. It cites one former principal of a large metropolitan government school, ‘Natalie’, who noted that formal priorities should be set to stop ‘absolutely everything becoming a priority’.

<sup>3</sup> The other criteria are: Consultation and engagement with school community, Implementation process that includes clear priorities/goals in defined timeframes, and Results and progress to date.

<sup>4</sup> The Evidence For Learning guidance report (2019) notes that schools can ask themselves questions such as: Are there opportunities to make fewer, but more strategic, decisions, that can be pursued with greater effort? Are there practices identified as less effective, that can be stopped to free up time and resources for other more strategic practices?

School improvement experts note that there should be no more than 2 to 5 goals in a plan (Hanover Research, 2014). Catherine Barbour, a Principal Turnaround Consultant at the American Institutes for Research, argues for a ‘less is best’ policy. She notes:

‘Part of the initial process is prioritizing [*sic*] the many identified needs and findings into two or three high-need, high-impact areas and then ensuring that the district stays focused on those identified areas. Districts are tempted to add on additional objectives, but they should avoid doing so. You’re not going to be able to address every area that has been identified; it is impossible to track and monitor that.’

(Hanover Research, 2014)

Focusing on too many priority areas at once can ‘weaken the energy of the school’; it can also be demoralising if results are not achieved and contribute to change fatigue if there is an extensive list of areas requiring change (Hanover Research, 2014). Rather, a more select list of improvement priorities can create momentum for continuous positive transformations (Hanover Research, 2014).

Similarly, approaches and practices that sit under each goal should be selectively chosen. In work jointly conducted by the Rennie Center for Education Research and Policy, and EdResearch for Recovery, researchers partnered with 5 school districts to improve alignment of programs with evidence on best practice for school improvement. A key takeaway from their work was that district leaders should ‘narrow’ their focus. They note that districts that ‘make the difficult choice to prioritize [*sic*] a small

number of high-leverage initiatives – and are intentional about making connections across these initiatives – will see the strongest results’ (Eaton, 2022).

Overall, 2 to 5 well-chosen goals, each supported by a small number of approaches and practices, will likely yield strong outcomes.

## Content of goals, approaches and practices that is aligned with the evidence base

The substantive content of goals, approaches and practices should be aligned with the ‘what works’ evidence base in school improvement literature. This evidence base includes evidence summarised in AERO’s [Tried and Tested](#) series, and large-scale studies such as meta-analyses that identify effective school improvement strategies.

Furthermore, evidence on what might constitute effective content of goals, approaches and practices is represented in the different Australian systems’ school improvement frameworks. These frameworks draw on evidence to identify the goals, approaches and practices of excellent schools. Examples of such frameworks include New South Wales’ School Excellence Framework (SEF), Victoria’s Framework for Improving Student Outcomes (FISO) and National Catholic Education Commission’s Continuous Improvement Framework for Catholic Schools.

## Defined processes for monitoring and evaluation

Along with ‘evaluation’ as a distinct activity of the school improvement planning cycle, plans should have monitoring and evaluation features embedded into the artefact. Specifically, school strategic plans should contain clear performance measures that draw on appropriate data and reference clear timeframes for achieving goals.

In strong school strategic plans, performance measures are set for each goal (Layland & Redding, 2017). These measures can be quantitative or qualitative, and should include a baseline and draw on a range of data sources to understand progress (Layland & Redding, 2017). There are 2 types of data that should be identified in robust monitoring and evaluation approaches:

- **process data:** to measure if practices are applied in the way they were planned
- **outcome data:** to measure if practices are having the desired effect on student learning

(New South Wales Department of Education, 2021a, b).

Setting appropriate and clear timeframes for achieving outcomes is also important; timelines should be particularly clear in any resulting action plans, so that schools can monitor their progress and check that they are achieving outcomes in a timely way (Johnston, 2012).

When developing multi-year plans, milestones should be set for at least 2 years ahead and assigned to individuals or teams (Layland & Redding, 2017). A timeframe for a goal should be accompanied by reference to 'how will we know when we've achieved it' (Johnston, 2012).

## Coherence within and across documents

An effective school strategic plan also needs to be coherent. There should be a sense of continuity, from the mission and vision statements, to goals, approaches and practices, through to the monitoring and evaluation approaches (Carvalho et al., 2022).

Evidence of 'theory of action' or 'theory of change' thinking for student success should run throughout school strategic plans (Fullan, 2006; Hawley Miles, et al., 2018; Johnston, 2012). To operationalise this, Layland and Redding (2017) note that plans 'need to be constructed in ( ... ) a theory of action, using if ... then ... and statements'. It is important that these if-then-and statements are underpinned by evidence that suggests that 'if' something is attempted, it will 'then' likely lead to this 'and' that result (Fullan, 2006).

Coherence is important not only within school strategic plans, but also between related documents that constitute the artefacts for a school strategic plan, such as multi-year and annual plans.





## Summary of key features of effective school strategic plans

The key features of an effective school strategic plan are summarised in Table 1.

**Table 1:** Key features of effective school strategic plans

No.	Key features of effective school strategic plans
1.	Compelling mission and vision statements
2.	Specific, sharp and select goals, approaches and practices
3.	Content on goals, approaches and practices aligns with evidence base on 'what works' in school improvement
4.	Coherence within and across documents (for example, across multi-year and annual plans)
5.	Defined processes for monitoring and evaluation that are data-informed, and contain clear performance measures and timeframes

## Conclusion

This literature review has identified key features of effective school strategic plans. These features are summarised in Table 1.

While this review has highlighted the lack of research that identifies causal relationships between specific features of plans and educational outcomes, there is clear evidence of positive correlations between strategic plans and outcomes.

Ultimately, the research suggests that it is not the mere existence of plans, but the quality of these plans that drive school improvement (George et al., 2020). It is this recognition of the importance of quality, and the resulting care and attentiveness to the different components of plans, that matters in constructing an effective school strategic plan.

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