*Strategic Planning Discussion Paper by Matthew Ivulich*

As a College entering a new phase of beginning, looking for direction to foster growth and activity in a high calibre learning environment with a noticeably improved culture and educational standards, we must first develop a formal strategic plan and understand the need to become a strategically focused organisation. To understand what this means, this paper will begin by outlining my first iteration of the broad vision for our College (you will note this will only begin our forward discussions) and how we can develop and implement a strategic process that will have the hallmarks of best practice with a focus on sustainability. These dimensions, its different forms and definitions, the social and political issues related to education design, combined with my own 'lived experiences', will provide a basis for critical reflection within the landscape of strategic planning itself.

Gratton (2000) reminds us that strategy is a learning process, not unlike the process we all wish to nurture in our students with their experiences at our College. Davies (2011, p. 42) reinforces my belief of resisting "the temptation to rush in and start writing plans, but to stand back and do the important task of reflecting." The concept of reflective intelligence (MacGilchrist, 2004) is vital to grow within our communities. It enhances Mintzberg (2003) thoughts of embracing strategic planning as "thinking as seeing" to capture both the expected future and the world not already invented. I often term this as thinking outside the box and we must encourage our teams not to forget this aspect.

The learning process needs to highlight an analysis component. Not knowing where the College is now would be not rational. Entering into a process that is iterative (Davies, 2011, p. 47-48), involving all stakeholders, builds the capacity and capability to "provide an educational product and service, both now and in the future." It provides the catalyst to form the mental models that establish the common and clearly understood components to build a successful strategic plan. All of the above must engage the stakeholders. Providing opportunities for them to converse (formal and informal), to involve and motivate them will build the sustainability

required for success. Ownership has always played an important role in my past roles, and will certainly belong to my new role.

My role at the beginning, during and moving forward pivots on the articulating of the strategic process in its many forms; oral, written and structural. Using criteria such as "what is best for the students," as highlighted in Davies' (2011, p.65), in all these forms of communications, adds weight to the critical mass for the 'why' and the 'what.' It also reinforces the need to distinguish between operational and strategic decisions, so we do move forward on building a strategically focused College.

Having a strategic process in place provides a good foundation for the development and implementation of a strategic plan. The second element of a strategically focused school is to have a strategic approach. Davies (2011) describes three strategic approaches. The first is the strategic plan that is rational, linear and predictable. This delivers the key elements of the 'journey' and maintains strategic direction that has a 'big picture' perspective. The second approach is the emergent strategy. This will make us capable of reacting to unforseen changes, build up patterns of behaviour that are more reflective, and then later, proactive in its stance. The last approach is strategic intent. This follows naturally from the development of a futures perspective and leads to the formal strategic planning process. Here knowing what major changes we want but not yet knowing how to achieve them, provides the College the best course of being strategically focused. Such an approach brings to life Mintzberg's (1989) reference of leaders "crafting strategy." Again, I feel my own experiences confirm this notion and the need to build capacity in our middle leadership and executive structures. The use of not just one approach, but a portfolio, has merit. This helps to later understand operational plans, their need and detail, but not to make the mistake of carrying the same detail over into strategic planning. We will build the domains for the College to know where it is now, and look forward in the short and long term. It will provide the reference for good conversations to begin. It is the quality of these conversations that Davies (2011) continually highlights. It is the balance of these

written documents that will produce a "holistic planning process with a strategic and operational focus" (Davies, 2011, p. 92).

Understanding the mission of our College is fundamental to the development of our strategic plan. It must be articulated well to clarify 'who we are and what we are doing here.' It will guide those involved in the strategic planning process to understand the nature of our College and where it wants to go. This will provide the reasons why parents send their children to our College and why our staff work here. It reinforces an acceptance of our joint beliefs and values for all our stakeholders. Our mission statement will always highlight very clearly the College's purpose and vision to be an inclusive community, an awareness of faiths, our intercultural awareness and support of our beliefs and traditions. It expects all stakeholders to play a part in the growth of our children's wellbeing and learning. A sense of belonging emerges from this, an important element in the growth of us all. The core values of personal integrity, excellence and relevance of learning, respect, and service can be stated as the framework to guide its practices. It shapes the landscape for questioning, identifying and formulating continuous improvement.

When considering factors that Nanus (1992, p. 16-18) highlights, that include energising people, excellence and building bridges into the future, we must find a way that our College can deliver its inspirational factor. This emphasis on adding a flavour of inspiration will assist the College's movement forward and its leadership to enhance the change management strategies. Adding an historical or contextual overview of the College, with a clear and inspirational mission, vision and values statements will provide the ability to 'walk the talk' not just 'talk the talk.' It can reference our humble beginnings and speak of our ambitions for our children in today's world and its future. Again, for our leaders with their teams, it can provide a currency for strategic gain.

The College has been blessed to grow from its humble beginnings. With its continued growth, we need to recognise the need to restructure the administration of the College to meet the increased demands of educational change, our community and of compliance and accountability within the teaching profession. Developing our human resources, governance and leadership structures and capacities within the board, teaching and support personnel to satisfy these demands will commence this restructure. Reaching out to grow our community, engaging them will parallel the growth of our footprint on education. Addressing our current campus, future campuses, their future development (capital development master plan) and our culture for teaching and learning, pedagogy (for example the flipped classroom) and the supporting curriculum framework will foster growth and activity to ensure a high calibre learning environment to embark our College upon our new phase of its history for an exciting future. Again, underlying this tremendous responsibility for our College will be our values and beliefs. Hence, as a strategically focused organisation, our first domain will always be our Faith Community. The emphasis to develop for our students a philosophy, ethics and spiritual journey, from their entry to our College into their adult life, needs to be nurtured with a curriculum presence and encouragement to engage with connections to their families, parishes, communities (local and global) and further studies.

Developing this futures-perspective will set the foundation for our overall planning process because we will identify our key focus areas, and hence prioritise our efforts. Davies (2011) makes mention of how the mindset of most staff will focus on operational matters, the day to day tasks, the effects it has on the individual. The task of our good leadership is to shift this to the median and long term objectives. The articulation and understanding of a good rationale is vital here. It can produce the changes we need to assist in the paradigm shifts that deliver 21st Century learning, not the 19th and 20th century "factory" model.

It will also grow the idea that "sustainability is not the same as maintainability" (Davies, 2011, p.12). That we need to build on the past to create continuous improvement. The notion of

not just short term goals, rather how they fit into long term goals is a simple way of describing how we should encourage our staff to strategically think. Short and long term are integrated. As a shared concept, I intend to create a community that is shaped by a Teaching and Learning Council (consisting of all middle leaders, including Project Managers) to grow and understand the long term goals, while having consistency in the operational matters that drive the school to achieve these objectives. It is important for me to show that I follow the example of a servant leader and that I will build capacity on also focusing the model of distributed leadership. No one person can achieve the goals set by a strategic plan. It not about the "I" but rather how we promote the culture of team and joint capacity to articulate our vision and the underlining practices to support this. I am confident that to develop a collaborative style of professional reform with my teams will assist in our future directions.

The importance of identifying and consulting with key stakeholders is vital. For it is these people who know most about the College and they are certainly the ones who would be most committed to its improvement.  So, as I enter this new environment, the ability to 'scan the horizon' to develop a clear picture and insight into the College's environment would be valuable into the formulation of a new strategic process and plan. Clarifying the understanding of this environment, a useful methodology is the STEEP analysis tool.  The five elements of STEEP are:

1. Social

   Demographics, Religion, Education, Age Distribution

2. Technological

   Technological advances, innovation, its affect on strategies

3. Educational

   Point of Difference, engaging educational framework, holistic, teacher development, accountability, pedagogy

4. Economic

Sustainability, State of Economy, Fees, Enrolments

5. Political

Legal, compliance, Government Funding, Globalisation, Multi-cultural

This process will help access the appetite for contemporary educational thinking and its affect on our client base. It will assist creating a point of difference in an Independent School market. As a Principal and a governing body, it will develop the close understandings required to progress our school. Blum's (2003) paper embraces the STEEP analysis with the following five-step plan:

1 Comprehend the element of the environment being analysed (current, future trends)

2 Interrelationship between trends (any conflicts)

3 Relate trends to issues (identify what will help or hinder)

4 Forecast future trends (identify driving forces behind issues)

5 Derive implications (conclusions to impact present and future strategic initiatives).

These processes of collecting data and their analysis are important and I know how time consuming they can be. I have in the past utilised outside contractors and know how successful this investment of using professionals who have no attached bias. I have been fortunate to build a very good list of consultants to draw upon. I know these consultants will also recognise the importance of the stakeholders (which I insist on) in this process, as highlight in Kowszun (1992) overview of the soft systems methodology.

The next stage of developing an implementation or action plan will follow. "Getting things done," a principle highlighted by (Quong and Walker, 2010), rings loud in Davies' (2011) advice of the considerations needed to effectively translate our strategic approach into action. We need to focus firstly on a few themes that will make a real difference. Identifying a small list of domains to clarify this is how I have previously started, and will be used in my next strategic

planning process. This keeps it simple and directs the questioning and the commitment of the stakeholders. Therefore, the stakeholders, can then align and the capacity can then grow to make it a shared task, building a continuous process within a distributive leadership model. Here, I am a strong believer in providing the resources to build leadership capacity. An important element I have used in the past.

Building the futures dialogue (and intent) by creating a learning orientation and capacity into my executive and middle management, so they will be able to articulate the "why" and the 'what," will be highlighted in their professional development. Again, Quong and Walker (2010), frameworks this by building "focused leadership reflection and action." Their reminder that the definition of strategic leadership is more than management processes of analysing, planning, implementing, monitoring and evaluating (the operational side starts to raise its head again), rationale linear processes of writing vision statements, but leaders who use strategic approaches and processes confirmed my thoughts.

Quong and Walker (2010) list seven principles that will confirm our approach. Their first principle of "Futures oriented and strategy" aligns itself with the importance of emergent strategy noted in the dialogue when discussing different approaches to strategy. Principle Two insists on "evidence based and research led." This develops the rationale to assist in the clear articulation of all the stakeholders to maximise success. The notation that strategic leaders "get things done" (Principle Three), must be evident. The work done in supporting, resourcing and role modelling leadership decisions, building capacity, accountability. autonomy, and not least of all, confidence, plants the seeds of sustainability for a school to deliver its strategic goals. Thinking outside the box, developing innovations that "open new horizons" describes Principle Four. Here recognising what currently is occurring, is it proving to work and how is this shown, can adopting different approaches deliver improved student outcomes must all be at the forefront of our decision making. Principle Five highlights that you must be "fit to lead." Mental and physical wellbeing, not just for yourself (role modelling it) but that of our teams highlights the holistic

nature of our core business for all members of our communities. This extends to being "good partners" (Principle Six), displaying collaborative work practices and distributive leadership models to connect with staff, parents and students, within and outside our own schools. Their last principle, "do the next right thing," encompasses the care, the honesty and transparency of our decisions to build a better community. Listening and admitting mistakes, displaying how we should all work together, again needs to be role modelled well, and to support one's own wellbeing and growth.

With our domains agreed on and understood, the organisational factors of translating into short term outcomes (I like to call these the initiatives), can be identified with time periods for these to be started, abandoned, actioned (in sequence or parallel) and completed. Supporting the building of a strategically focused environment develops of the strategic architecture of our College. It connects strategy with culture, relationships, learning and resources. The "significance of this approach is that it provides a series of implementation initiatives and strategies for the school to adopt" Davies (2011, p. 137). This framework will assist in building capacity and capability of our leadership teams by providing a holistic overview and a corresponding discussion on the monitoring and evaluation process, allowing the feedback and reflection loop vital to ensure that strategy turns into action.

As the Principal now, working with yourselves to drive a new strategic plan, I know it will contain the important domains of teaching and learning, student wellbeing, community engagement and our Faith journey, all of which, need the curriculum to drive if they are to have meaning. It becomes very important we action Sinek (2009) conclusions of getting the "why" correct first, to continue the cycle of the "how" and "what." The "why" is our Strategic Plan, the "what" are the initiatives we seek to deliver. These initiatives should result in the philosophy and frameworks mentioned in the MCEETYA and ACARA papers. The educational goals for young students (MCEETYA, 2008, pp. 8-9) describing them as successful learners, confident individuals and active and informed citizens highlights such a philosophy. The *Shaping Paper*

containing the principles and guidelines for development (ACARA, 2008) sets up a framework. Again, my experiences have seen the "how" fail in the political driven agendas in the history of curriculum forms, though the numerous reports and changes, that result in teachers having to make sense (and endure the pain) of these to deliver the best outcomes for our students. Hence, my journey has taken me to minimising this political interference, while simultaneously moving forward on our strategic aims to deliver the best pedagogy, teacher capabilities and development, and wellbeing for our community.

I will begin in my first weeks of my role interviewing each staff member. Their input of what works and what is needed will help set a foundation for my understanding of the landscape. The STEEP analysis tool highlights key factors to guide my questions. Supplementing this will be an auditing process for our human resources (governance, executive leadership, middle leadership, teaching and non-teaching), our cost centres, revenue centres, ITC infrastructure (very important to have its own strategic plan to deliver our learning management systems and support 21$^{st}$ Century pedagogy) and infrastructure in general. A detailed and unbiased report on each of these will be gained by the use of selected outside consultants. Connecting with our current and prospective parents will be important. The use of parent information evenings and parent focus groups along the journey provides valuable input to our strategic domains, but also to the implementation plans to action these. My own presence in our community connecting our strategic plan will be part of its development. I am hopeful, with the support from focus groups, I can build the vital relationships and trust of our community in delivering the learning environment they expect. This is not to assume that our families understand contemporary education. I see it as my role to educate their understanding, and to grow this within our own staff and leaders.

My focus will be to expose our community to the best of Teaching and Learning Frameworks. A good example is the International Baccalaureate (IB). I have successfully utilised this framework to be a catalyst for curriculum planning. The IB Primary Years Programme (PYP)

and IB Middle Years Programme (MYP) are Teaching and Learning frameworks, not curriculum frameworks. They can accommodate the Australian Curriculum and provide an excellent preparation for students to engage in the VCE, VET or other programmes to maximise students' individual aspirations and achievement. These types of frameworks, with our Strategic Plan, can comprise our School Improvement Plan that is a requirement for government funding. Adopting the PYP and MYP could be an example of an excellent and significant step in moving towards an internationally recognised standard. A fact that would appeal to our context. The IBO authorisation and evaluation process means that our College's programme and teaching methodologies are audited against internationally established benchmarks. Additionally, our teachers have access to an international network of educators willing to share their practice.

The accountability systems inbuilt into frameworks such as the IB, boosts the rigour we all (including our politicians) wish translate into NAPLAN, Pisa results and economic objectives. The programmes support the required essentials and highlight the integration practices that match the developmental years of our students. It is student-centred, not teacher-centred. It balances our own history with the need for our students to be a global citizen. The compulsory second language up to Year 10 is also a great example of this balance. Again, it supports our context and gives credit for this aspect of their curriculum time, unlike current practices in many other schools that do not value this. The standards and compliance structures that can be measured, drives the scope and sequencing of learning skills (approaches to learning) that enhance creativity within the essentials. The reflective component of these skills challenges the teacher to develop the learning to learn environments, without discounting the exit outcomes our students are striving to achieve at the conclusion of their secondary schooling. Including their preparation for adulthood, independence, reliance and other character strengths (values and beliefs).

Utilising frameworks such as the IB is not the only answer. It requires other 'pieces of the jigsaw' to be realigned. Addressing issues of the over-crowded curriculum, building

programmes for relationships to be nurtured, providing choice and 'not squeezing out the fun' of education are all important. The major 'beast' here is the timetable. Schools must realise the significance of this factor. Trying to live new paradigms with old constructs will cause friction. The development of a timetable to support a curriculum that builds in mentoring opportunities, tutorials (choices outside the regular content) and timeframes that maximise learning (longer learning sessions including the introduction of the concept of line days – one complete school day on one subject). We cannot think of our College as a Monday to Friday, 8.30 to 3.15 experience only. With our students who travel large distances to be part of our community, the expansion of the digital learning environment, tutorials within and outside these times, new learning hubs set off the current campus, must all be considered. The type of learning spaces will also play their part in delivering a complete curriculum. Learning 'hubs', spill areas, flexible open spaces and 'caves' can encourage and developed team teaching, allowing (or forcing) teachers not to remain in their silos. The 'flipped' classroom is alive and supporting differentiation.

To assist in presenting, communicating, implementing, monitoring and evaluating our action plans will be the formation of our own College Teaching and Learning Council (TLC). This is a strong professional learning group of middle leaders, that through an ongoing process in which educators work collaboratively in a recurring cycle of collective inquiry and action research (learn by doing) to achieve better results (the focus) for the students they serve, ensures everyone has the same understanding of a reform and is used as a collaborative style of professional reform. Burgess, et al (2010) and Harris and Jones (2010) support the high output form of professional development through this concept. They believe this model is unique in its proven ability to build capacity to change participants by transforming their attitudes and beliefs.

I would advocate that professional learning communities are an instrument for facilitating enhanced learning, teaching, and leadership capacity at all levels of any education system.

When educational leaders become determined and purposeful about improving student learning, they seek first to agree on the means to this end. Nevertheless, the structured teaching and learning of this group requires extensive planning. I will engage an outside facilitator to work with me in building the capacity of our Teaching and Learning Council.

So now as my journey continues, it is the very nature of my leadership to continue to improve. This improvement will be based on feedback. I consider my core business to be people. To engage my community, source their collective experiences and articulate a clear, shared vision is a road I will travel. The basis of this vision, as it has done in the past, will be to create the ground-breaking opportunities to combine the results of our world's renowned pedagogical researchers with the expertise of some of our very best teachers. The feedback I already seek has always included our parents. Parent surveys and focus groups help this to occur in an open, honest and trusting environment. The affirming of our vision and actions is naturally very satisfying, but the debate that can allow our community to role model and position our College as a leader in education, empowers everyone to lead. I have always realised that the degree of my success as a leader will be by the number of leaders I create. These leaders can occur at different levels, and regardless if they are students, teachers or parents, their growth is a measure I value. It will be an accomplishment to be acknowledged in the future by the number of schools who network our journey and its ongoing growth. However, these schools that do come to us, will provide us a natural vehicle to debate the direction of our vision and its consequence. It is my hope to continue to improve and live my values through my actions while placing our College at the forefront of visible teaching and learning. Providing our young students with a relevant, holistic and effective 21st century education by using quality curriculum, teaching, learning, assessment and reporting, surrounded by our values and beliefs.

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