

Goldsmiths University of London  
Department of Educational Studies

**An investigation into the problems  
involved in the implementation of  
a suggested Strategic Planning Model  
for schools in Saudi Arabia**

**A PhD Thesis Presented By**

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## Declaration

I hereby declare that this thesis is the result of my own investigations, except where otherwise stated. Other sources are acknowledged giving explicit references. A bibliography is appended. I declare also that this work has not previously been accepted in substance for any degree and is not being currently submitted in candidature for any degree.

Name: .....Ahmad M. Makhdoom.....

Signature: .....

Date: .....

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## Dedications

*This thesis is dedicated to the Soul of my father Mohammad Makhdoom, peace and mercy of Allah will be upon him through his insightful vision that enlightened all aspects of my life.*

*My mother, whose love, endless prayers and tears have sustained me while I was far away.*

*My brothers and sisters.*

*My dear loving wife Zakiyya through her long-suffering, continuous support and everlasting encouragement.*

*My sons Mohammad and Hosam.*

*My daughters Samah and Alaa.*

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## Abstract

Strategic planning at school level is a new concept in the field of education in Saudi Arabia, where the educational system is centralised and directly controlled by the Ministry of Education. The aim of this research was to investigate the consequences of implementing a specially devised strategic planning model in individual schools in Saudi Arabia.

Twelve schools of average size were chosen as a representative sample: four elementary, four middle and four secondary schools. Interviews with senior management suggested a general lack of awareness of strategic planning at school level and some resistance to giving more autonomy to schools.

The Makhdoom Strategic Planning Model, which has a distinctive vision-led format, was proposed and adopted in the sample schools. Perceived benefits included participants choosing their own vision for the school, sharing views and contributing to the decision-making process. Problems were discovered and discussed during initial interviews, subsequent workshops, and final interviews with school staff: lack of information and resistance to change were identified as the main potential challenges to introducing the Model into schools. Some compromises would be needed to avoid conflict with the central system. Leadership from head teachers and the availability of a facilitator were important factors for success.

In addition to extending understanding of the value of strategic planning in the context of the Saudi Arabian education system at school level, this thesis presents an easily applicable, vision-led, 10-step Strategic Planning Model which can be used by managers in many other educational contexts.

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## TABLE OF CONTENTS

DECLARATION .....	II
DEDICATIONS .....	III
ACKNOWLEDGEMENTS .....	IV
ABSTRACT .....	V
TABLES.....	X
FIGURES.....	X
<b>CHAPTER ONE - INTRODUCTION AND AUTOBIOGRAPHICAL ACCOUNT ...1</b>	
PURPOSE OF THE RESEARCH.....	1
<i>Research Title</i> .....	1
<i>Research Aim</i> .....	1
<i>Research Objectives</i> .....	1
VALUE AND CONTRIBUTION OF THE RESEARCH.....	3
SUMMARY OF METHOD .....	4
STRUCTURE OF THESIS .....	5
AUTOBIOGRAPHICAL ACCOUNT OF THE RESEARCHER’S BACKGROUND.....	6
<i>Experience in school management</i> .....	6
<i>The King Fahd Academy</i> .....	9
<i>Developing the Strategic Planning Model</i> .....	11
<i>Conclusion</i> .....	12
<b>CHAPTER TWO - THE SCHOOL SYSTEM IN THE KINGDOM OF SAUDI ARABIA .....</b>	<b>14</b>
<i>Introduction</i> .....	14
<i>The Kingdom of Saudi Arabia</i> .....	15
<i>Foundation and aims of education in Saudi Arabia</i> .....	15
<i>The Act No. 779</i> .....	16
<i>The structure of the education system</i> .....	17
STRUCTURE OF THE SCHOOL SYSTEM.....	18
<i>Private and public education</i> .....	21
<i>Special Education</i> .....	21
<i>Vocational training for youth</i> .....	22
THE STAGES OF SCHOOL EDUCATION IN SAUDI ARABIA .....	22
<i>Elementary Education</i> .....	23
<i>Intermediate Education</i> .....	30
<i>Secondary Education</i> .....	35
<i>Conclusion</i> .....	43
<b>CHAPTER THREE - THE SAUDI MINISTRY OF EDUCATION’S TEN YEAR PLAN .....</b>	<b>45</b>
<i>Introduction</i> .....	45
<i>Background</i> .....	46
REASONS FOR SETTING UP A TEN YEAR PLAN .....	46
PLAN DETERMINANTS AND GENERAL STRATEGIES .....	47
<i>Challenges that education faces in the Kingdom</i> .....	47

---

VISION DETERMINANTS .....	50
CORPORATE STRATEGY AND THE OPPORTUNITIES PRESENTED .....	51
THE TEN YEAR PLAN: PREPARATION AND IMPLEMENTATION .....	52
THE MINISTRY OF EDUCATION'S VISION IN K.S.A.....	60
<b>CHAPTER FOUR - LITERATURE REVIEW .....</b>	<b>62</b>
INTRODUCTION .....	62
<i>A brief examination of the historic roots of strategic planning.....</i>	<i>64</i>
<i>Evolution of strategic planning into business .....</i>	<i>66</i>
<i>Evolution of strategic planning into higher education.....</i>	<i>69</i>
<i>Evolution of strategic planning into school education.....</i>	<i>71</i>
<i>Concepts of planning and strategy in the business context.....</i>	<i>73</i>
<i>Definitions and concepts of strategic planning .....</i>	<i>77</i>
<i>Similarities and differences between strategic planning and long-term planning.....</i>	<i>84</i>
<i>Benefits of the strategic planning process.....</i>	<i>88</i>
<i>Limitations of strategic planning.....</i>	<i>90</i>
STRATEGIC PLANNING MODELS.....	94
THE MAKHDOOM STRATEGIC PLANNING MODEL.....	101
<i>The preparation phase.....</i>	<i>101</i>
<i>Step 1: Identifying a suitable vision for the school .....</i>	<i>104</i>
<i>Step 2: Developing the school's mission statement.....</i>	<i>107</i>
<i>Step 3: Stating the school's values. ....</i>	<i>110</i>
<i>Step 4: Selecting the improvement fields.....</i>	<i>112</i>
<i>Step 5: Conducting a SWOT analysis.....</i>	<i>113</i>
<i>Step 6: Stating, specifying, or modifying the school's general goals.....</i>	<i>116</i>
<i>Step 7: Stating the school's objectives. ....</i>	<i>118</i>
<i>Step 8: Writing the school action plan. ....</i>	<i>119</i>
<i>Step 9: Implementing the action plan.....</i>	<i>121</i>
<i>Step 10: Revision, evaluation, and monitoring. ....</i>	<i>124</i>
<i>Circularity and wider applications of the Model .....</i>	<i>126</i>
<b>CHAPTER FIVE - RESEARCH DESIGN AND METHODOLOGY .....</b>	<b>128</b>
CHOICE OF METHODOLOGY .....	128
INTERVIEWS.....	130
<i>Constructing the interviews.....</i>	<i>131</i>
<i>Group interviewing.....</i>	<i>133</i>
<i>Qualitative Interview Analysis .....</i>	<i>134</i>
CASE STUDY .....	135
REPRESENTATIVE SAMPLE .....	138
RESEARCH DESIGN .....	139
DATA COLLECTION AND PREPARATION .....	140
<i>The initial interview questions.....</i>	<i>141</i>
<i>Workshops and training sessions .....</i>	<i>143</i>
<i>The final interview questions.....</i>	<i>143</i>
ETHICAL CONSIDERATIONS .....	146
<i>Confidentiality and cultural expectations .....</i>	<i>146</i>
<i>Researcher's position.....</i>	<i>146</i>
<b>CHAPTER SIX - FINDINGS AND ANALYSIS .....</b>	<b>147</b>
Introduction .....	147
INTERVIEWS WITH HIGHER MANAGEMENT PERSONNEL .....	148

---

---

<i>Interview analysis</i> .....	150
TWELVE SCHOOLS .....	176
CASE ONE: ELEMENTARY SCHOOL NO. 1 .....	179
<i>School characterisation</i> .....	179
<i>Interview analysis</i> .....	182
CASE TWO: MIDDLE SCHOOL NO. 1 .....	200
<i>School characterisation</i> .....	200
<i>Interview analysis</i> .....	203
CASE THREE: SECONDARY SCHOOL NO. 1.....	225
<i>School characterisation</i> .....	225
<i>Interview analysis</i> .....	228
<i>Secondary School No. 1 Final Interview:</i> .....	236
CASE FOUR: ELEMENTARY SCHOOL NO.2 .....	244
<i>School characterisation</i> .....	244
CASE FIVE: MIDDLE SCHOOL NO.2 .....	245
<i>School characterisation</i> .....	245
CASE SIX: SECONDARY SCHOOL NO.2.....	247
<i>School characterisation</i> .....	247
<i>Interview analysis, Combined Schools No 2</i> .....	250
CASE SEVEN: ELEMENTARY SCHOOL NO. 3.....	268
<i>School characterisation</i> .....	268
CASE EIGHT: MIDDLE SCHOOL NO. 3 .....	270
<i>School characterisation</i> .....	270
CASE NINE: SECONDARY SCHOOL NO. 3 .....	271
<i>School characterisation</i> .....	272
<i>Interview analysis: all three private boys' schools</i> .....	275
CASE TEN: ELEMENTARY SCHOOL NO. 4.....	288
<i>School characterisation</i> .....	288
CASE ELEVEN: MIDDLE SCHOOL NO. 4 .....	289
<i>School characterisation</i> .....	290
CASE TWELVE: SECONDARY SCHOOL NO. 4 .....	291
<i>School characterisation</i> .....	291
<i>Interview analysis: all three private girls' schools</i> .....	294
ANALYSIS OF CASE STUDY FINDINGS .....	313
<i>Type of planning</i> .....	313
<i>Experience in strategic planning</i> .....	313
<i>Meaning of strategic planning</i> .....	314
<i>Luxury or necessity?</i> .....	314
<i>The need for school strategic planning</i> .....	315
<i>The application of strategic planning in Saudi Arabian schools</i> .....	315
<i>The adoption of school strategic planning in Saudi Arabian schools</i> .....	316
<i>Permission and support to conduct school strategic planning</i> .....	317
<i>The effect of school strategic planning</i> .....	318
<i>Benefits of strategic planning</i> .....	318
<i>Specific difficulties in implementing the MSPM</i> .....	319
<i>The obstacles, limitations and problems of school strategic planning</i> .....	320
<i>During the workshop sessions:</i> .....	322
<i>Writing the action plan</i> .....	324

---

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<i>Rural, private and girls' school vs city school</i> .....	325
<i>Differences between the stages of education</i> .....	326
<i>Summary</i> .....	326
<b>CHAPTER SEVEN - CONCLUSION AND RECOMMENDATIONS</b> .....	<b>327</b>
<i>The research objectives</i> .....	327
<i>The research questions</i> .....	328
ATTITUDES TO STRATEGIC PLANNING AT THE END OF THE STUDY .....	332
<i>Limitations of the study</i> .....	336
<i>Contribution of the study</i> .....	336
<i>Suggestions for further studies</i> .....	339
<b>REFERENCES</b> .....	<b>340</b>
APPENDIX 1 - RESEARCH DOCUMENTS .....	350
<i>Consent to participate in research</i> .....	351
<i>The initial interview questions</i> .....	353
<i>The final interview questions</i> .....	355
APPENDIX 2 - RESEARCH PHOTOGRAPHS .....	357

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## Tables

TABLE 2.1: DEVELOPMENT OF ELEMENTARY EDUCATION.....	24
TABLE 2.2: DEVELOPMENT OF ELEMENTARY SCHOOLS.....	25
TABLE 2.3: ELEMENTARY STUDENTS.....	25
TABLE 2.4: SUBJECTS FOR ELEMENTARY EDUCATION.....	26
TABLE 2.5: DEVELOPMENT OF INTERMEDIATE EDUCATION.....	31
TABLE 2.6: DEVELOPMENT OF MIDDLE SCHOOLS.....	32
TABLE 2.7: MIDDLE SCHOOL STUDENTS.....	32
TABLE 2.8: CURRICULUM FOR INTERMEDIATE EDUCATION.....	33
TABLE 2.9: CURRICULUM FOR SECONDARY SCHOOLS 1.....	36
TABLE 2.10: CURRICULUM FOR SECONDARY SCHOOLS 2.....	36
TABLE 2.11: CURRICULUM FOR SECONDARY SCHOOLS 3.....	37
TABLE 2.12 CURRICULUM FOR SECONDARY SCHOOLS 4.....	37
TABLE 2.13 DEVELOPMENT OF SECONDARY EDUCATION.....	39
TABLE 2.14: SECONDARY SCHOOLS.....	40
TABLE 2.15: SECONDARY STUDENTS.....	40
TABLE 4.1: DIFFERENCES BETWEEN STRATEGIC AND LONG TERM PLANNING.....	87
TABLE 4.2: DIFFERENCES BETWEEN VISION AND MISSION STATEMENT.....	108

## Figures

FIGURE 2.1: CENTRAL CONTROL OF THE SCHOOL SYSTEM.....	20
FIGURE 4.1: BRYSON AND ALSTON:ABC OF STRATEGIC ISSUES.....	822
FIGURE 4.2: JOHNSON AND SCHOLES MODEL.....	98
FIGURE 4.3: MAKHDOOM MODEL (MSPM).....	103
FIGURE 4.4: ACTION PLAN CHART.....	121
FIGURE 4.5: TASKS AND ASSIGNMENTS CHART.....	123
FIGURE 4.6: CHART FOR PARTICIPANTS.....	124
FIGURE 4.7: MONITORING AND EVALUATION CHART.....	125
FIGURE 6.1: THE INTERVIEWED HIGHER MANAGEMENT PERSONNEL.....	149

# **Chapter One - Introduction and Autobiographical Account**

## **Purpose of the research**

### ***Research Title***

**An Investigation into the Problems Involved in the Implementation of a Suggested Strategic Planning Model for Schools in Saudi Arabia.**

### ***Research Aim***

This research aims to investigate the possible obstacles to implementing a suggested Strategic Planning Model in schools in Saudi Arabia and the possible problems raised as a direct result of the implementation.

### ***Research Objectives***

- To introduce the Saudi Education System in order to provide the context for the research. This will include discussing the Ministry of Education's ten-year plan (2004 – 2014) for educational development.
- To review the literature on the implementation of strategic planning in education in general terms and in Saudi Arabia in particular.
- To examine and review possible appropriate Strategic Planning Models for implementation in the smallest education system units (the schools) in Saudi Arabia.

- To define and present the Makhdoom Strategic Planning Model (MSPM), which will be implemented in sample schools for this research study.
- To discuss and identify the problems that may arise both before implementing, and as a direct result of implementing, the MSPM and to recommend ways in which those difficulties can be overcome.
- To identify those areas where school autonomy is possible and those where schools are obliged to implement government policy.

**The objectives will therefore be used to address the following questions:**

- Can the Makhdoom Strategic Planning Model (MSPM) be implemented in the smallest units in the Saudi educational system (schools)?
- What are the potential challenges posed by the initial implementation of the MSPM in those schools?
- What are the possible problems that may arise from implementing the MSPM?
- What is the impact of these problems on the feasibility of implementing the MSPM in schools in Saudi Arabia?
- How can the Strategic Planning Team in each school overcome these barriers?

## **Value and contribution of the research**

The value of this research is that it is likely to shed light on previously ignored academic and strategic management issues, such as the importance of utilising strategic planning in schools in general and in the Saudi education system in particular.

The research aims to contribute towards, and extend understanding of, the value of strategic planning in the context of the Saudi Arabian education system at school level.

The research also aims to contribute towards and extend the body of knowledge and to fill the academic gap on the topic of school strategic planning in general, and its relationship to school improvement, academic and administrative achievements.

It is argued that in Saudi Arabia, the school strategic planning process can play a very important role in the development of the Saudi education system, thus enabling Saudi educators to utilise modern western management techniques and practices in pedagogy. Although the Saudi system is centralised, this study contends that for individual schools to define their own vision and goals can only benefit the system as a whole.

This study will be the first in the area of school strategic planning within the Saudi context. Completing this research successfully will make a significant contribution to the school strategic planning debate in Saudi Arabia. It is hoped that this study will be considered as the focal point for launching and embarking on a meaningful debate on school strategic planning within the Saudi context.

Moreover, although this study is specific to the Saudi education system, it may well be of interest to educators in other countries and may lead to further useful research, or indeed the implementation of the MSPM in educational contexts elsewhere.

## **Summary of method**

This research study will use a qualitative approach. Twelve schools in Saudi Arabia will be telling their story of implementing the MSPM and the problems they encountered. Three schools will be studied individually; the others are combined schools and will be studied as three groups.

The research data will be collected in three phases. The first phase will be the initial interviews. The second phase will be the observation that takes place during the implementation of the MSPM in each school. Finally, the third phase of data collection will be from the subsequent interviews with the same participants who were involved in the initial interviews, the school Strategic Planning Teams and some of the other school stakeholders.

Four schools will be selected from each educational stage. Four elementary schools, four middle schools, and four secondary schools will be chosen to participate in the study. In each educational stage, the sample will include one school from the city, another from a village, a private school, and a girls' school. The schools chosen will all be of average size, in the Saudi context, for their educational stage and environment<sup>1</sup>.

### **The research will proceed as follows:**

1. An initial evaluation of the difficulties that may emerge from implementing the MSPM in Saudi schools, based upon previous research including the author's pilot study in one school in Saudi Arabia.

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<sup>1</sup> Details of the schools, including pupil numbers, are given in Chapter Six.

2. Semi-structured interviews with senior educational administrators in the Makkah region.
3. The selection of four schools from each of the 3 stages of the Saudi education system.
4. Initial semi-structured interviews with the head-teachers, deputies, some of the potential Strategic Planning Team in each school, and other school stakeholders.
5. The implementation of the MSPM in each school.
6. Observation and monitoring of the implementation process in each school.
7. Further semi-structured interviews with head teachers and the Strategic Planning Team in each school at the appropriate time.
8. The collection of research data based on the observations, written forms and the interviews.
9. An evaluation of the research data.

## **Structure of thesis**

This thesis consists of seven chapters. Following this first introductory chapter, the second chapter is a general description of the current system of school education in Saudi Arabia. Chapter Three describes the Saudi Ministry of Education's Ten Year Plan. A review of the literature on strategic planning in general, and strategic planning in education in particular, is presented in Chapter Four, and the same chapter also discusses strategic planning models and explains in detail the Makhdoom Model

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(MSPM) which will be implemented. The research methodology is described in Chapter Five. Chapter Six presents the findings from the researcher's field trips, and the twelve case studies of schools, in addition to an analysis of interviews with other stakeholders including senior management. The qualitative data, which consists of notes and comments taken throughout the school visits, workshops and final interviews, is presented and analysed. Chapter Seven is the final chapter, offering discussions of the research results, limitations, conclusions, and recommendations.

### **Autobiographical account of the researcher's background**

The author of this thesis has considerable experience in the field of education in Saudi Arabia. The following personal account will make clear his position regarding the research and the development of the MSPM.

#### ***Experience in school management***

My interest in school strategic planning first developed in 1987, when I began my career in school management as a deputy head teacher at the King Abdul Aziz High School. Prior to this, I held the post of teacher for eight years at the same school. A further four years of my career were spent as a head teacher at the Prince Majed Middle School in Makkah, followed by another four years as a Principal at the Dar Al-Alum High School also situated in Makkah. In 1999, I was employed as an Educational Supervisor in The Ministry of Saudi Education in the Makkah Regional Education Department, where I gained another five years of experience in academia.

Initially, I was drawn towards the idea of adapting industrial and business managerial concepts for use in educational organisations. These concepts incorporated techniques

such as: human relations, public relations, leadership style, total quality management, as well as strategic planning. Since then, I have developed a specific interest in strategic planning and I now feel the need to acquire further knowledge about how planning strategies can be adopted and successfully enforced by educators within the education system in Saudi Arabia. A need to introduce and apply such techniques has shown itself throughout my career, from a stage where no planning was required, to a time when planning was essential and obligatory.

In 1987, my role as Deputy Head Teacher at the King Abdul Aziz High School meant that I had to follow direct instructions from my Head Teacher on a daily basis. Educational planning was not an obligatory requirement of my job description. The Head Teacher was also spared the daunting task of producing any form of written plans, as it was not a requirement of the Ministry of Education at that time.

In 1991 my duties as Head Teacher at the Prince Majed Middle School involved membership of the Planning Committee which was formed by the Makkah Regional Education Department. This scheme was set up by the Ministry of Education to help head teachers produce and implement action plans within their particular schools. This meant that I was involved in producing a model for my school, which consisted of an action plan for the school's activities throughout the academic year 1991/1992. This plan incorporated several lists of actions that had to be effectively enforced throughout the first and second semesters, and the set aims and objectives to be successfully completed, measured and achieved by the end of the academic year. At the end of this period there were mixed opinions about the outcome of such planning and techniques. Some head teachers found it a useful tool for improving the performance within their schools and welcomed this method; however, others found this technique to be too

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complicated and awkward, particularly in smaller sized schools.

In 1995 my responsibilities as Head Teacher at the Dar Al-Alum High School involved instructing my Deputies to produce plans for the subsequent year, paying particular attention to aims and objectives, and to specify how these could be effectively measured and realistically achieved. Initially, they found the task demanding, but they soon felt confident enough to manage and successfully achieve most of their set goals. There was a significant improvement in the subsequent years, which can be seen from the fact that they developed the ability to implement short-term plans with greater ease and to a professionally acceptable standard. Planning on a yearly basis proved to be a useful experience for them, but failed to be an effective measure for the Dar Al-Alum, considering the large intake of the school. Therefore, it was essential for my Deputies and me to design a long-term plan that could be applied for the next three years.

In 1999, I had the privilege to work as one of ten Educational Regional Supervisors for four hundred schools situated within the Holy City of Makkah. The painstaking task eventually led to our team devising long-term educational plans and presenting them to eighty Head Teachers and their Deputies, who were given the freedom to alter and adjust these plans to suit the individual needs of their schools. However, the shortcoming of this freedom to alter and adjust soon revealed itself. It was found that each school plan was unique in its contents, but there was a lack of unity between the schools. There were noticeable differences in the fields, aims, styles and the implementation of their strategies. The much-desired need to unify and to focus in the same direction seemed a long way off. A major flaw was that the school administrators who concentrated on developing individual plans failed to share ideas collectively with school stakeholders such as: teachers, pupils, parents, and other parties affected by the

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decisions made. It was concluded that their contribution would have played a more positive role in the outcome of the schools' plans, and the need for these parties to be involved was seen as a crucial factor to be considered in all future proposals. Nevertheless, it is important to note that significant progress was evident in some schools.

During the summer of 1999, I was invited to attend a two-week seminar at Kent University in Ohio, USA. The main focus of this workshop was discussion and exercises primarily about the successful implementation of strategic planning in an academic environment. This gave me the opportunity to introduce my publication titled *Strategic planning in an educational establishment, the concept and its importance*.

In 2001, I gave a talk to a meeting of the Presidents of the School Administration Department and the Managers of the Educational Supervision Department in Riyadh, in Saudi Arabia. During the same year I was the facilitator of workshops presented to nearly one hundred head teachers in Makkah regarding the need for strategic planning. In 2002, I was visited by officials from the Ministry of Education and asked to prepare a presentation on school strategic planning at a meeting of Heads of the Educational Administration Department in Riyadh.

In 2002, the same year, I published my book, *School Strategic Planning*, which further developed the concepts I had been working on, and distributed 2000 free copies to the Ministry of Education in Riyadh and Makkah schools, thereby disseminating the ideas within the book at school level.

### ***The King Fahd Academy***

In 2003 I was appointed as the Saudi Curriculum Supervisor at the King Fahd Academy

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(K.F.A) in London. The school is divided into British education- and Saudi education-based schooling for pupils between the ages of five and eighteen years. The British School primarily caters for the educational needs of Muslim and Arab children who are permanent settlers in the U.K. The Saudi School is designed to provide education for temporary students, usually those whose parents are Saudi diplomats on a short stay of a maximum of five years in Britain. In order to conform to Islamic teaching, the Academy is divided into girls' and boys' sections. To complicate matters further, the KFA also consists of a Distance Learning Department, which has a separate intake of pupils preparing to sit examinations as external students. Overall, the KFA is divided into five separate self-managed schools, which at the time created problems, indeed an obvious lack of harmony and failure of co-ordination between the five branches.

When I first arrived at the Academy, I was surprised to find that none of these schools produced or implemented up-to-date short-term or long-term plans. Neither did the teachers, management and those in authority display any interest or enthusiasm in wanting to provide such planning in order to improve the already declining standards within the KFA. This decline could be seen, for example, where examination results were corrected. Their relaxed attitudes and the lack of professionalism meant that they were more than comfortable to continue using old action plans which were not necessarily compatible with the new situation or intake of students. I felt that the cause of this lack of harmony and the failure amongst the five branches of the KFA to work collectively as a team was a combination of factors, the most obvious being the confusion amongst staff as to the roles and responsibilities assigned to them and an apparent lack of training or professional teaching qualifications to provide them with the necessary skill to teach or to produce educational planning that would benefit the

students. Unfortunately, the academic well-being of these pupils was exclusively in the care of these so called ‘teachers’ and ‘managers’ who did not possess the appropriate skills or the desired attitudes to change and to improve. The KFA seriously lacked structure and any form of strategic planning which would help everyone to move forward. This encouraged me to assess and to evaluate the problems involved for the sole purpose of introducing the concept of strategic planning within the five separate schools of the KFA.

### ***Developing the Strategic Planning Model***

By the end of January 2004, I had developed a proposed strategic plan, which primarily focused on the improvement and the smooth delivery of education in the Saudi curriculum. This led to a working paper titled *Saudi Curriculum at The King Fahd Academy – Strategic Plan Proposal*. In June 2004, I had the privilege to present this paper during an educational conference at Taif, Saudi Arabia, organised by The Saudi Arabian Ministry of Education for the Principals of the King Fahd Academies worldwide, as well as other Saudi schools abroad. In September 2004, The Board of Trustees and senior management at the KFA produced a new agreed plan of change, which aimed to replace the Saudi / British curricula with the International Baccalaureate Programme. The new plan incorporated several elements of my Strategic Planning Proposal, as well as giving me the opportunity to share ideas and to provide support to the Board of Trustees.

The notion of strategic planning has been further highlighted and supported within the Saudi Education System with the beginning of the Ten Year Plan for the academic years 2004 to 2014, introduced by the Ministry of Education in Saudi Arabia during 2003,

which in its context introduces the strategic planning concept. This Plan will be described in Chapter Three, following an outline of the Saudi education system.

In 2005, I worked with Al-Rahmaniah Elementary School in Makkah as a facilitator to implement the school's five-year strategic plan. It was a school plan that covered all the school personnel and teaching activities. The school was also under other educational programmes. Now, the school is not only the most desirable government school in the area, but it is also preferred over many private schools in the neighbourhood.

In the last few years, I have been working in London but I continue to keep myself well-informed on all developments in the field of education in Saudi Arabia.

### ***Conclusion***

I think it would be fair to say that I am recognised as one of the pioneers of school strategic planning in Saudi Arabia. My initial interest in conducting the current research stemmed from my paper titled *Strategic planning in an educational establishment, the concept and its importance* (2001), which was developed further in my book *School Strategic Planning* (2002) and which highlighted the need to appreciate, apply and implement strategic planning within Saudi schools and the education system in Saudi Arabia. With the adoption of the Ten Year Plan in 2003, this is now one of the main educational targets in the Kingdom.

My Strategic Planning Model, which forms the core subject of this research, has numerous advantages. It is a 'continuing circle' model, which can be used as long as the school or other organisation exists. It has a very clear and easily applicable 10-step structure and can be used in any school, in Saudi Arabia or elsewhere, and at any level of school management. It is vision-led, which makes it suitable for organisations where

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shared values are important. I feel that it potentially represents a useful and serious contribution to the field of education management, one which has already been tested in pilot studies and will be examined further and in more detail in this research.

## **Chapter Two - The School System in the Kingdom of Saudi Arabia**

### ***Introduction***

This chapter aims to give some insight into the school system in Saudi Arabia and to introduce some background for its development. The various stages of the education system at school level will be discussed, together with the problems and challenges facing Saudi educators. This will shed light on the aims of education in the Kingdom and the general principles that education in Saudi Arabia depends on. In addition, basic information about the system such as its size and structure, the academic year, its administration and finance, as well as private and public education sectors and their teacher qualification programmes will be explored. Each stage of the educational system will be presented within the scope of the age of admission and length, along with the quantitative development of each stage for both public and private education for the period covering the academic years 1994/1995 to 2004/2005. Brief information will be given about the curriculum content and the programmes of study, and the challenges faced at each stage.

The chapter will then highlight the centrally directed nature of the system and suggest that there is room for more autonomous goal-setting and definition of vision at school level, which could be addressed by the introduction of continuous strategic planning carried out by school staff and stakeholders.

### ***The Kingdom of Saudi Arabia***

The Kingdom of Saudi Arabia is one of the largest Middle Eastern Arabic countries and was founded by King Abdulazize Ibin Saud in 1932. Geographically, it occupies about four-fifths of the Arabian Peninsula, with a surface area of 1,960,582 sq km. It is bordered on the west by the Red Sea; on the north by Jordan, Iraq and Kuwait; on the east by the Arabian Gulf, Qatar, the United Arab Emirates and Oman; and on the south by Yemen.

Saudi Arabia is an Islamic state, in which the ‘Shari’ah’ (Islamic Holy Law) serves as both constitution and legal framework. The population was estimated by the UNESCO Institute for Statistics to be 25,206,000 in 2008.<sup>2</sup>

### ***Foundation and aims of education in Saudi Arabia***

At the time when the Kingdom of Saudi Arabia was founded, education was not accessible to everyone and was limited to individualised instruction at religious schools in Mosques in the urban areas. These schools taught Islamic Law and basic literacy skills. By the end of the twentieth century, Saudi Arabia had a growing nationwide education system, providing free training, from preschool through to university, to all its citizens. While the study of Islam remains at its core, the modern Saudi educational system provides a high quality of education in diverse fields of modern and traditional arts and sciences. This variety in education and training helps to meet the Kingdom’s growing need for highly-educated citizens to build on its rapid progress.

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<sup>2</sup> Source: UNESCO Institute for Statistics at [www.stats.uis.unesco.org](http://www.stats.uis.unesco.org) [accessed April 2011]

### ***The Act No. 779***<sup>3</sup>

The aim of education was stated in the Act No. 779 dated 17-9-1389h (equivalent to 1968 AD) entitled: “*The educational politics, policies and philosophy in the Kingdom of Saudi Arabia*”. The interpretation of its aim for education in the Kingdom of Saudi Arabia is as follows: “**To appreciate and understand Islam correctly and comprehensively; to plant the Islamic faith and broaden it; to provide the student with Islamic values, principles, instructions, directives, and high morals in order to grant the student knowledge, different skills, and to construct positive behavioural attitude; to improve the society’s development economically, culturally, and socially; to prepare the individual to be a useful member in his society.**”

This aim is highly relevant to this study, as it expresses the central importance of a vision for the education system, based around shared values. As will be discussed later in Chapter 5, the Makhdoom Model for strategic planning, which will be tested at school level in this research, is also vision-led and is thus considered by the author to be particularly suitable for the Saudi context. However, it would also be suitable for any other education or public service system which similarly has a shared ethical vision at its core.

The Act further outlined the fundamental general principles for the Saudi education system, and some of the important principles follow:

1. Equal opportunities for students and the right to choose specialties.

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<sup>3</sup> Translated from, *The educational politics, policies and philosophy in the Kingdom of Saudi Arabia*. Act no. 779 at 17 -9-1389h 1968 AD, Ministry of Education Publication 4<sup>th</sup> Edition 1995.

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2. Provision of free education of all types and at all levels.
3. The freedom for female students to be educated as suits their individual needs and to be prepared for their task in life with decency and reverence in the light of the Islamic law, the women are sisters of men.
4. The principle that education does not detract from religion, but relies on its essence.

### ***The structure of the education system***

Saudi Arabia first introduced formal elementary education in the 1930s. By 1945, King Abdulaziz bin Abdelrahman Al-Saud had initiated an extensive programme to establish schools throughout the Kingdom. Six years later, in 1951, the country had 226 schools incorporating 29,887 students. In 1954, the Ministry of Education was established, headed by Prince Fahd bin Abdulaziz as the first Minister of Education. The first university, now known as The King Saud University, was founded in Riyadh in 1957 (Alghamdi, and Nouraldeen, 2002).

Currently, Saudi Arabia's nationwide public educational system comprises twenty universities, more than 35,000 schools, and approximately 5,500,000 students of both sexes, together with a large number of colleges and other educational training institutions. Open to every citizen, the system provides students with free education, books and health services. A measure of the Government's substantial commitment to this sector is the allocation of over thirty five per cent of the annual State budget for education including vocational training. The academic year begins in September and ends in June.

The Government of Saudi Arabia values the importance of the education process, because of its critical need in developing the country's human resources. Therefore, since the beginning of the 21st century private educational facilities have also been opening all over the country. As the leader of this nation and the Custodian of the Two Holy Mosques, King Fahd bin Abdulaziz has often stressed how the young people of Saudi Arabia are the country's most valuable resource. Education is central to family and community life. Parents are involved in their children's education, and the close links between home and school are a reflection of the structure of the community and of the nation at large.

Education in Saudi Arabia is under the management of three main authorities: the Ministry of Education; the Ministry of Higher Education; and the General Organisation for Technical Education and Vocational Training. In addition to this, all the government ministries have authority over certain types of educational institutions: the Ministry of Education which is in charge of general education for male and female students, teacher training, special education, as well as adult education and literacy, vocational education and training. The Ministry of Higher Education supervises university education, colleges of education, and is assisted by the General Organisation for Technical Education. Likewise, Vocational Training is a huge department which is responsible for developing technical and vocational programmes in response to national manpower requirements.

### **Structure of the school system**

The stages of school education in Saudi Arabia consist of the pre-school 'kindergarten', followed by six years of elementary schooling which then leads onto three years each of

middle and secondary school. These will be discussed in more detail later in this chapter. The Ministry of Education sets overall standards for the Country's education system, as well as for education for individuals with special needs. Early in 2003, the General Presidency for Girls' Education was dissolved and its functions taken over by the Ministry of Education, in order to administer girls' schools, supervise kindergarten and nursery schools and to sponsor literacy programmes for females.

This centrally controlled 'top-down' chain of command, which is illustrated in Figure 2.1 below, is an important feature of the system and is generally believed by Saudi educators to be beneficial, especially as the demand for education in the country has developed so rapidly. However, as this study will discuss in later chapters, it may be that, at school level, the habit of receiving instructions from the Ministry has led staff and managers to make less contribution to the school's individual aims than they could do if they worked together more independently of the authorities.

Schools are not co-educational. The first government school for girls was built in 1964, and by the end of the 1990s there were girls' schools in every part of the Kingdom. Of the nearly 5 million students enrolled in Saudi schools for the academic year 2003-04, about half were female<sup>4</sup>.

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<sup>4</sup> Information Office of the Royal Embassy of Saudi Arabia in Washington DC.

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FIGURE 2.1

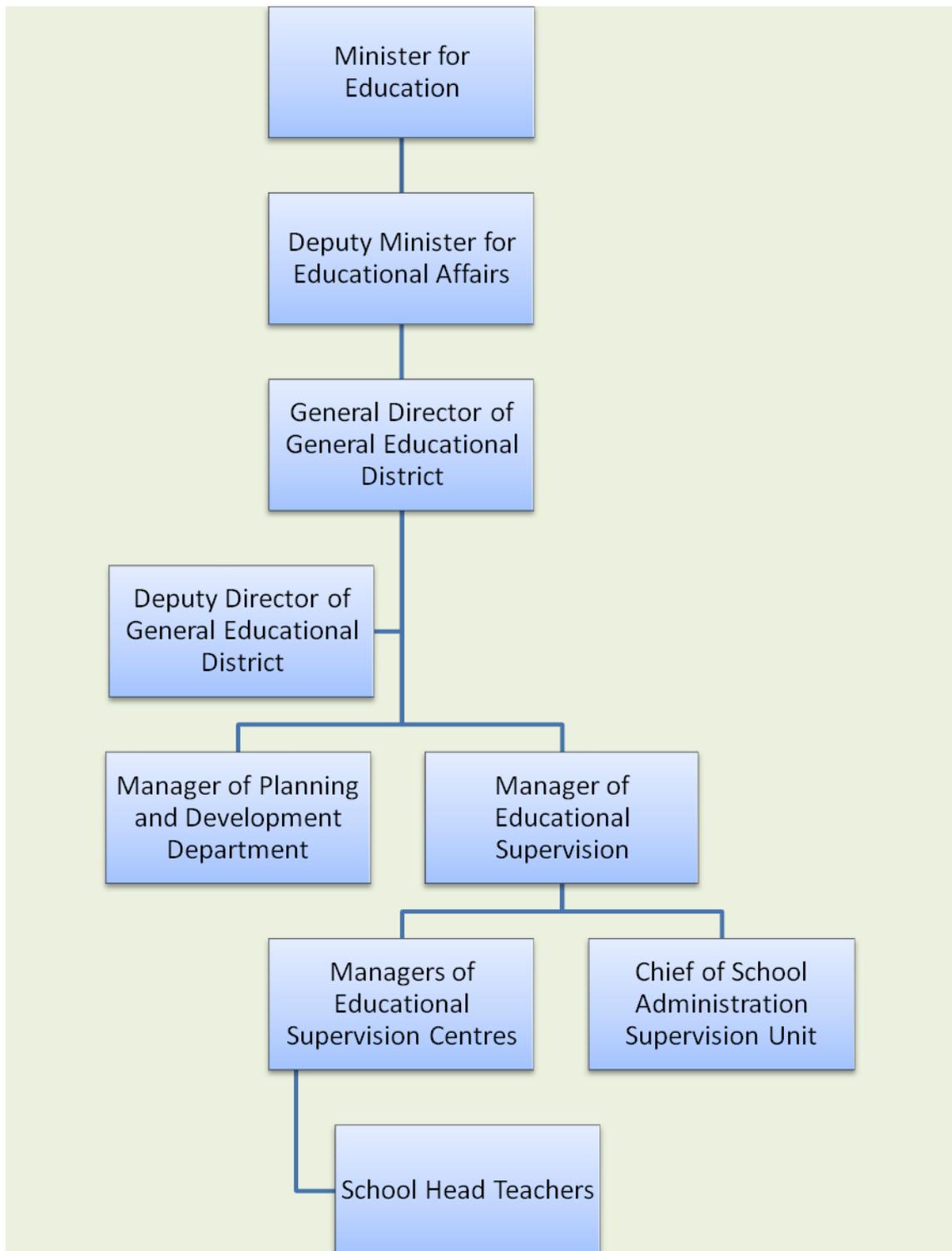


Figure 2.1: Central Control of the School System Source: the Author.

At the age of six, children enter elementary education, which continues for six years. Upon completion of Grade Six, students sit for an examination and if successful are awarded the Elementary Education Certificate, which qualifies them for middle or intermediate school. Intermediate studies last three years, followed by secondary education for the same period of time. Students have the choice to attend either secondary schools that offer programmes in both the arts and sciences, or vocational schools. Students' progress through secondary school is determined by comprehensive exams which are conducted twice a year and supervised by the Ministry of Education.

Both general and specialised studies are offered at the secondary level. Students who successfully complete secondary education may continue their studies at university or other further education institutions. University studies usually last four years for programmes in the humanities and social sciences and five to six years in medicine, engineering, and pharmacy.

### ***Private and public education***

Private education is officially encouraged in the Kingdom of Saudi Arabia. Private institutions exist at all levels and receive government funding and administrative support. Licences for opening private institutions are granted only to Saudi citizens, and these private schools have no right to grant qualifications at any stage of education. Nonetheless, direct state supervision of private schools ensures standards that are at a level equal to that of government schools.

### ***Special Education***

The Special Education Department of the Ministry of Education operates schools for the blind, deaf and the physically and mentally disabled. Other institutes care for older

students with special needs. The special schools are part of the Kingdom's effort to encourage every individual to reach his / her full potential.

### ***Vocational training for youth***

The Kingdom has identified technical and administrative training as an essential sector of education in order to support the country's socio-economic development. Graduates of training programmes in health care, agriculture, teaching and other areas are steadily filling positions at industrial, agricultural and social institutions throughout the country. The General Organisation for Technical Education and Vocational Training and the Ministry of Labour and Social Affairs operate most of the Kingdom's vocational training centres and higher institutes of technical education. The Ministry of Education also operates vocational secondary schools, and several other government organisations run institutes or training centres in their particular specialties. These Institutes specialise in training for machine tooling, metalworking, electro-mechanics, and auto mechanics, offering young Saudis the opportunity to learn skills that are in high demand, and provide courses specifically tailored to meet the needs of unemployed members of the population.

## **The Stages of School Education in Saudi Arabia**

The following sections will describe the three stages of formal schooling, which are represented in the schools studied for this research.

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## ***Elementary Education***

### **Age of admission**

Students can register in elementary (primary) school at the age of six years and they remain in the elementary school until the age of twelve, starting from Year One and ending in Year Six. Girls' schools generally apply the same curricula as boys' schools, with some minor modifications which suit the girls' sphere and match their role in Saudi society. These minor modifications concentrate on the girls' rights and duties and the natural and biological differences between boys and girls. The Islamic Teachings contain different advices for women during their monthly period and pregnancy in the way they perform praying, fasting or making the Hajj duties. In most girls' schools Physical Education is replaced by coursework in women's and art education.

Students are promoted from one grade to the next by passing the examinations offered at the end of each year. Students who pass the examination at the end of Grade Six are awarded the Elementary Education Certificate, which qualifies them for study at the Intermediate level.

### **Quantitative development**

Saudi schools have expanded rapidly in recent years. Table 2.1 below shows the quantitative development of **elementary** public and private education in Saudi Arabia from the academic years 1994/1995 to 2004/2005.

TABLE 2.1

School year	Schools		Classes		Students		Teachers		Administrators	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
1994-95	4976	3832	45185	35742	980465	820703	61049	53792	296	3058
1995-96	5167	3930	47520	36996	1019708	857208	62891	57076	952	3181
1996-97	5296	4193	49331	39013	1028978	893076	65968	60577	1054	3353
1997-98	5556	4673	51923	43210	1074883	963737	71026	67614	1184	3709
1999-2000	5697	5014	54580	45380	1117655	997081	75392	74511	1394	3841
2000-2001	5707	5164	56381	47306	1135545	1033092	80198	80734	1663	1616
2001-2002	5838	5379	58091	49649	1178716	1069526	83060	86260	1805	5535
2002-2003	5933	5576	58547	51140	1174411	1081774	84790	90668	1928	5659
2003-2004	6011	8547	58758	52626	1165378	1078235	86252	96282	2240	5892
2004-2005	6148	6086	59545	54034	1175556	1084293	88481	100527	2286	5991

**Table 2.1: Quantitative development of elementary public and private education in Saudi Arabia from the academic years 1994/1995 to 2004/2005.**

(Source: Saudi Ministry of Education report on educational development in Saudi Schools, 2007.)

TABLE 2.2

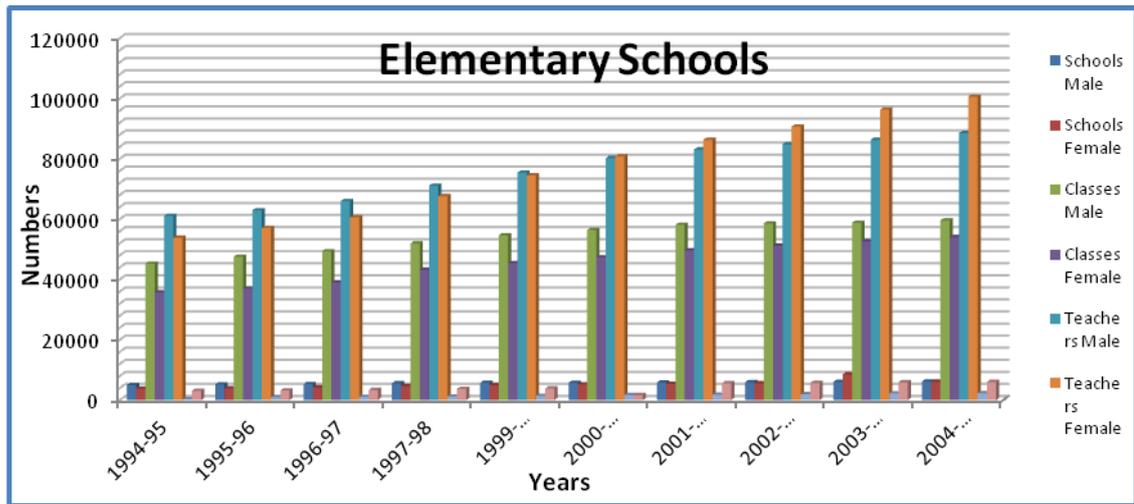


Table 2.2: Quantitative development of elementary public and private education in KSA from the academic years 1994/1995 to 2004/2005

TABLE 2.3

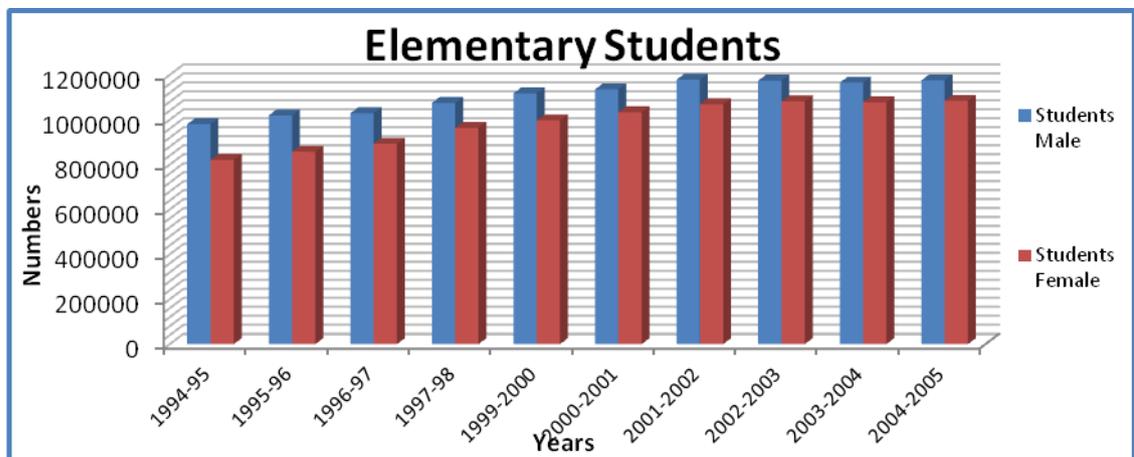


Table 2.3: Quantitative development of elementary public and private education in KSA from the academic years 1994/1995 to 2004/2005 ( Student Numbers )

The above bar chart (Table 2.3) highlights the greater number of male elementary schools when compared to female schools. One can also note that the numbers of schools, classes, students, and teachers have increased considerably, and, as is also shown in Table 2.1, the number of teachers relative to number of students has increased.. On the other hand, the number of administrators has not increased simultaneously between the periods of 1994 - 2005.

### Programme of study

The curricula in schools are set down by the Ministry of Education. The table below (Table 2.4) shows the subjects for the Elementary Education Curriculum for boys.

TABLE 2.4

Subject	Number of weekly periods per grade <sup>5</sup>					
	One	Two	Three	Four	Five	Six
Religious Education	9	9	9	9	9	9
Arabic language	11	9	9	9	8	8
Social Studies: Geography and History	-	-	-	2	2	2
Mathematics	3	4	4	5	5	5
Science and Health Education	1	2	2	2	3	3
Arts and Crafts	1	2	2	1	1	1
Physical Education	3	2	2	2	2	2
Total weekly periods	28	28	28	30	30	30

**Table 2.4: Subjects for Elementary Education Curriculum for boys' schools**

<sup>5</sup> Number of weekly periods per grade" refers to the weekly teaching hours per subject per year. A period means an hour of instruction time in a subject.

**Certificate obtained:** *Shahadat Al Madaaris Al Ibtidaa'iyah* (General Elementary School Certificate).

### **Problems in elementary education**

The educational problems of Saudi elementary schooling are not to do with structural problems in the system and curriculum, which might be difficult to resolve, requiring much time and intensive efforts. Rather, they appear to be problems resulting from the growth and development of education provision, and are problems such as often accompany the operations of progress, development, renewal, expansion and assimilation in any sphere. These problems can be summarised as follows:

#### *Educational loss*

The educational loss which may emerge from failure and result in high student drop-out rates is taken very seriously by the Saudi administrators. Several research studies have been conducted in the last two decades about this major issue. Al Ghamdi, and Abduljawad (2002) defined the student drop-out: “students leave education even before completing their stage registration period”. They describe the failure as “The repetition of students (staying more than a single year in the same class) if he or she did not pass the final test successfully”. (Al Ghamdi, and Abduljawad, 2002: 136).

In a statistical study carried out by the Ministry of Education in Saudi Arabia (1996) it became clear that “the ratio of drop-out and failure among boys is greater than the ratio among girls. This ratio relates to experience in the elementary school, as follows: the rate of failure in the elementary stage (10.8 per cent) corresponds to a drop-out rate of

0.4 per cent, declining yearly.” (Al Ghamdi, and Abduljawad, 2002: 136).

*Renting elementary school buildings.*

The number of public schools has increased in Saudi Arabia since 2002 to more than ten thousand schools, and more than half of those are in rented buildings. The Government of Saudi Arabia is forced to hire buildings to keep up with the rapid growth of demand accompanied by a growth in the number of students in elementary schools. These buildings were not originally designed to become school buildings: they were residential buildings that needed several modifications in order to fulfill the educational purpose and to cater for student need in the best positive way. The average area that students share in government-built elementary school buildings is nearly five times that shared by students in any rented school (Al Ghamdi, and Abduljawad, 2002: 134).

This is a huge national problem that the Government is trying to overcome. This figure is being dealt with yearly by testing a variety of possible solutions, but student numbers seem to continuously grow, making it necessary to provide a fair chance to all Saudi children to receive a much deserved elementary education.

*Teachers’ level of training in elementary schools*

Teacher training processes have gone through several stages in the Kingdom of Saudi Arabia and this has fundamentally affected the level of competence in elementary school teaching.

In the first stage, there was a desperate need for qualified teachers, as Saudi schools faced a severe shortage of teachers. At this stage, teachers graduated from the Institute of Teachers Primary Preparation (three years’ training after completing the elementary

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school). The second stage involved teachers graduating from Secondary Training Institutes which they could enter on completing the middle school. The third stage was where the teacher graduated from the middle faculties Community Teachers Colleges (two years after the Secondary School Diploma). The fourth stage was where the teacher graduated from the Teachers Preparation Colleges (four years after the Secondary School Diploma). This was the most recent stage for teachers' preparation, where a ministerial decision was issued from the Ministry of Education in 1989 deciding that the minimum qualification for a teaching career was the university certificate (Al Ghamdi, and Abduljawad, 2002: 135). However, it can be argued that even the latter is not adequate for teacher training, and perhaps teachers ought to be trained throughout their career and at least every three years.

#### *Generalisation of elementary education*

Saudi Arabia tries diligently to provide elementary education for all by setting up schools in towns, villages, and deserts in the kingdom. It has gone further by providing educational facilities where there are settlements. However, as reported by Al Hamed and others (2002), there seems to be an 18 per cent drop-out rate among Bedouin families, most of them being female. (Al Hamed, M. Zeyadah, M. Al\_Otaibi, B. and Motwaly, N. 2002:112)

#### *Lack of parent-school communication*

There are noticeable and widespread difficulties in communication between parents and school at the elementary level. This is also seen at pre-school level, but the problem at this stage seems to be more serious and more evident.

### ***Intermediate Education***

Upon completion of elementary education, students who qualify may attend lower secondary (“middle” or “intermediate”) studies. Intermediate education is offered during the day and also in evening programmes, which are designed for those who may find it difficult to attend during the day because of their work commitments, as well as mature students. It is also possible for students to do distance learning programmes and apply for the final examinations without having to attend classes. A student can register in Middle School at the age of twelve; intermediate education is three years in length, beginning from year one and ending in year three. As explained earlier, girls’ schools apply the same curricula as boys’, with some minor modifications which suit the girls’ sphere and match their role in Saudi society. Physical education is replaced by coursework in women’s and art education. The system of examinations is similar to those taken at the elementary level; examinations are given at the end of each semester of study.

**Certificate obtained:** *Shahadat Al-Kafa’at Al-Mutawassita* (Intermediate School Certificate)

### **Quantitative development**

The table below (Table 2.5) shows the quantitative development of **intermediate** public and private education in Saudi Arabia from the academic years 1989/1990 to 1999/2000.

TABLE 2.5

School year	Schools		Classes		Students		Teachers		Administrators	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
1994-95	1789	1153	11115	8027	283808	224205	22587	17060	1093	2200
1995-96	1935	1193	12154	8577	301696	247264	24819	18322	1110	1884
1996-97	2042	1359	13139	9492	317068	269362	26937	20492	1112	2034
1997-98	2217	1600	14446	10750	355488	303170	29503	23395	1149	2107
1999-2000	2383	1822	15920	12113	392634	336766	31950	27717	1359	2490
2000-2001	2418	1955	17220	13246	423865	371557	35165	30112	1638	2974
2001-2002	2568	2099	18134	14212	451350	394558	32637	36727	1547	3344
2002-2003	2695	2223	18982	14991	475057	416919	38600	35965	1567	3419
2003-2004	2826	2437	19693	16080	496568	444795	40407	40199	1729	3535
2004-2005	3012	2637	20553	17089	522428	471739	42102	44588	1692	3155

**Table 2.5: Quantitative development of intermediate public and private education in Saudi Arabia from the academic years 1989/1990 to 1999/2000.**

(Source: Saudi Ministry of Education report on the educational development in Saudi Schools, published in 2007).

TABLE 2.6

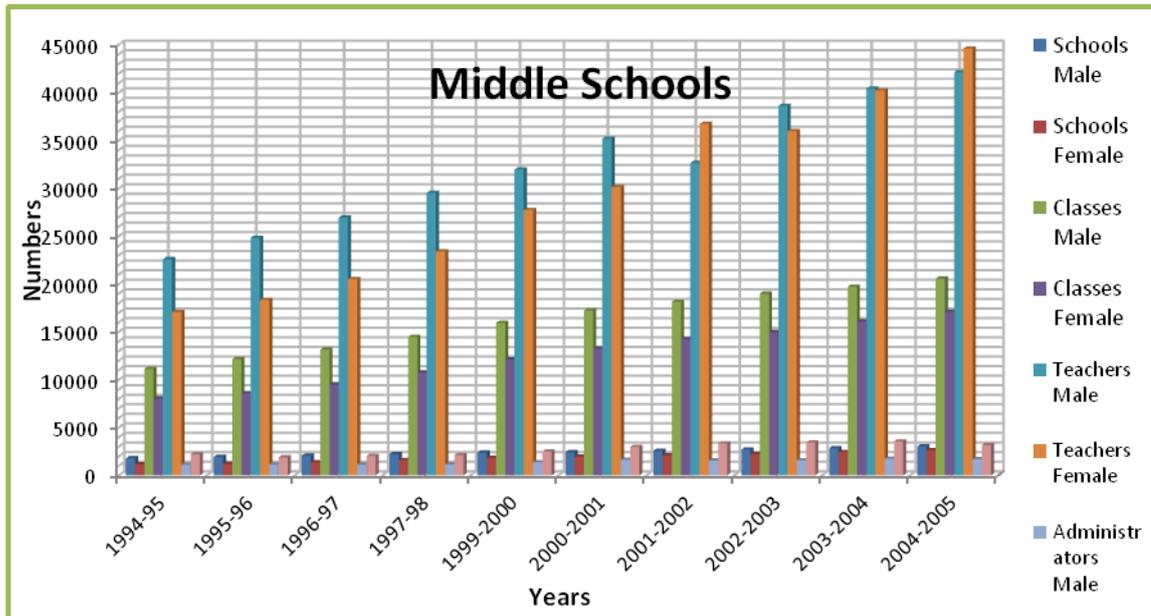


Table 2.6: Quantitative development of intermediate public and private schools in K.S.A. from the academic years 1994/1995 to 2004/2005

TABLE 2.7

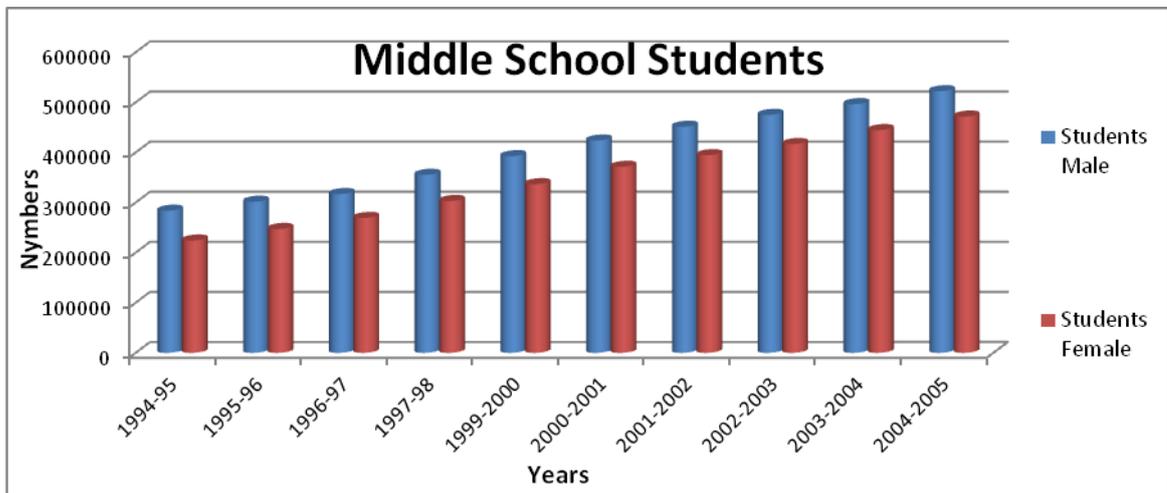


Table 2.7: Quantitative development of intermediate, public and private schools in K.S.A. from the academic years 1994/1995 to 2004/2005 (Student Numbers)

From Table 2.7 above, it can be observed that the number of male middle schools are

greater than the female middle schools. It is obvious that the numbers of middle schools, classes, students, and teachers have increased noticeably. On the other hand, the numbers of administrators have not increased at the same pace between the periods 1994 - 2005.

### Programme of study

Table 2.8 below shows the subjects for the Intermediate Education Curriculum for boys.

TABLE 2.8

Subject	Number of weekly periods per grade <sup>6</sup>		
	I	II	III
Religious education	8	8	8
Arabic language	6	6	6
History	2	2	2
Geography	2	2	2
Sciences and Health education	4	4	4
Mathematics	4	4	4
English language	4	4	4
Art education	2	2	2
National education	1	1	1
Physical education	1	1	1
Total weekly periods	34	34	34

**Table 2.8: The subjects for boys' Intermediate Education Curriculum**

<sup>6</sup> Number of weekly periods per grade" refers to the weekly teaching hours per subject per year. A period means an hour of instruction time in a subject.

## **Problems facing intermediate education**

Intermediate education in Saudi Arabia has faced many difficulties within the educational system. Most of these problems seem to be inherited from the elementary level. The challenges posed by intermediate education are summarised below:

### *Unstable developmental stage*

During the intermediate stage, students seem to display an increase in tension and uncertainty of personality.

### *Educational loss*

As is the case with each educational level in Saudi Arabia, the intermediate stage also suffers from a high dropout rate and student failure. In a study held in the Kingdom in 1995-1996, it was found that from each 1000 students registered in middle schools, only 786 students graduated. The figures for this report are stated below (Al Gamdi, 2002: 170):

455 students graduated after three years (without failure): 46per cent.

229 students graduated after four years (with one year failure): 23per cent.

102 students graduated after five years (with two years failure): 10per cent.

214 students dropped out without finishing their education: 21per cent

The financial cost of this educational loss was estimated at more than \$1,5 million.

### *Rented buildings in middle schools*

In 2002, the number of intermediate public schools was calculated as 1034 boys' schools and 1227 girls' schools. Sadly, more than half of these numbers (5161 boys'

schools and 5200 girls' schools) were in rented buildings. (Al-ghamdi, 2002: 171)

### ***Secondary Education***

Upper secondary education (also known as high school) is three years in duration and requires possession of the Intermediate Education Certificate for admission. A variety of options (streams) is available at the secondary level and students have a choice as to what type of institution they attend. General, Comprehensive, Vocational, and Industrial programmes are available. In addition, health institutes and nursing schools are part of the secondary school system. It should be noted however, that female students are limited in the choices available to them for secondary study. A student can register in secondary school at the age of fifteen and remain in middle school until s\he is eighteen years old, beginning from year one and ending in year three. Girls' schools apply the same curricula as boys' schools, with some minor modifications which suit the girls' sphere and match their role in Saudi society according to Islamic teachings.

### **Assessment and promotion**

At the end of the third year of study, students sit for the National General Secondary Examination (NGSE) and receive the General Secondary Education Certificate (GSEC). Students (males only) who have completed their education in religious secondary programmes receive the Religious Institute Secondary Education Certificate (RISEC).

**Certificate obtained:** *Shahadat Al-Marhalat Al-Thanawiyyat* (General Secondary Education Certificate), awarded to students who successfully pass the *Tawjihi* (General Secondary Examination).

## Programmes of study

*General Secondary School:* The following tables (Tables 2.9 - 2.12) show the different curricula available in the general secondary school.

1. TABLE 2.9 Curriculum for secondary general education (boys):  
Religious and Arabic Sciences:

Subject	Number of weekly periods per grade <sup>7</sup>		
	I	II	III
Religious education	5	12	12
Arabic language and literature	6	9	9
Social sciences	2	3	3
Natural sciences	6	-	-
Mathematics	5	-	-
English language	4	4	4
Computer	2	2	2
Library and research	1	1	1
National education	1	1	1
Physical education	1	1	1
Activities	1	1	1
Total weekly periods	34	34	34

**Table 2. 1: Secondary education: Religious and Arabic sciences**

2. TABLE 2.10 Curriculum for secondary general education (boys):  
Administrative and Social Sciences:

Subject	Number of weekly periods per grade*		
	I	II	III
Religious education	5	6	6
Arabic language and literature	6	4	4
Social sciences	2	5	4
Administrative sciences	-	5	6
Mathematics	6	4	4
English language	4	4	4
Computer	2	2	2
Library and research	1	1	1
National education	1	1	1
Physical education	1	1	1
Activities	1	1	1
Total weekly periods	34	34	34

**Table 2. 2: Secondary education: Administrative and Social sciences**

<sup>7</sup> Number of weekly periods per grade" refers to the weekly teaching hours per subject per year. A period means an hour of instruction time in a subject.

3. TABLE 2.11 Curriculum for secondary general education (boys):  
Natural Sciences

Subject	Number of weekly periods per grade*		
	I	II	III
Religious education	5	5	5
Arabic language and literature	6	3	3
Social sciences	2	-	-
Natural sciences	6	13	13
Mathematics	5	6	6
English language	4	4	4
Computer	2	2	2
Library and research	1	-	-
National education	1	1	1
Physical education	1	1	1
Activities	1	1	1
Total weekly periods	34	36	36

**Table 2.3: Secondary education: Natural sciences**

4. TABLE 2.12 Curriculum for secondary general education (boys):  
Technical Sciences:

Subject	Number of weekly periods per grade		
	I	II	III
Religious education	5	5	5
Arabic language and literature	6	3	3
Social sciences	2	-	-
Natural sciences	6	6	6
Technical sciences	-	8	8
Mathematics	5	5	5
English language	4	4	4
Computer	2	2	1
Library and research	1	-	-
National education	1	1	1
Physical education	1	1	1
Activities	1	-	-
Total weekly periods	34	35	34

**Table 2.4: Secondary education: Technical Sciences**

It can be noted from the above tables that religious education is a main component of all the syllabi in the general secondary schools. Additionally, there are some schools with a stronger focus on Islamic studies:

*Religious Secondary School:*

Syllabus: Arabic language and literature, English, general culture, geography, history and religious studies.

Certificate obtained: *Shahadat Al Thanawiyyah Al 'Aama lil Ma'aahid Al Ilmiyya* (Religious Institute Secondary Education Certificate). Graduates are admitted to university in the humanities and social sciences only.

*Technical Secondary School*

There are three types of technical education offered at the secondary level: vocational/technical, commercial and agricultural. Admission to a technical school requires the *Shahadat Al-Kafa'at Al-Mutawassita* (Intermediate School Certificate). All technical and vocational training comes under the authority of the General Organisation for Technical Education.

**Period:** Three years (ages 15 to 18)

**Syllabus:** Vocational/Technical: architectural drawing, auto mechanics, electricity, machine mechanics, metal mechanics, radio and television. In addition to technical subjects, students take Arabic, chemistry, English, mathematics, physical education, physics and religious studies

Certificates awarded:

Technical: *Diplom Al Madaaris Al Thanawiyyah Al Mihaniyyah* (Secondary Vocational School Diploma)

Commercial: *Diplom Al Madaaris Al Tijaariyyah* (Secondary Commercial School

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Diploma)

Agriculture: *Diplom Al Madaaris Al Ziraa'iyah* (Secondary Agricultural School

Diploma)

## Quantitative development

The table below (Table 2.13) shows the quantitative development of **secondary education** public and private schools in Saudi Arabia between the academic years of 1994/1995 to 2004/2005.

TABLE 2.13

School year	Schools		Classes		Students		Teachers		Administrators	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
1994-95	633	521	5340	4301	137718	118114	9247	8891	607	1162
1995-96	685	581	6065	4671	146671	132586	10122	9908	588	1212
1996-97	739	685	6266	5257	151510	143775	10880	11270	602	1263
1997-98	813	794	6596	5802	164278	152340	11702	12910	550	1318
1999-2000	895	875	7032	6625	183125	173635	12671	15266	675	1646
2000-2001	907	948	7755	7375	203742	202016	14598	16970	811	2037
2001-2002	1103	1064	8608	8225	234264	232168	16703	19091	908	2244
2002-2003	1191	1171	9588	9413	266550	267519	19197	22275	930	2278
2003-2004	1312	1361	10533	10749	300189	306529	21010	26792	940	2323
2004-2005	1441	1497	11603	11870	328489	338445	22998	30688	923	2098

**Table 2.5: Quantitative development of secondary education public and private schools in Saudi Arabia between the academic years of 1994/1995 to 2004/2005.**

(Source: Saudi Ministry of Education report on the educational development in Saudi Schools, published in 2007)

TABLE 2.14

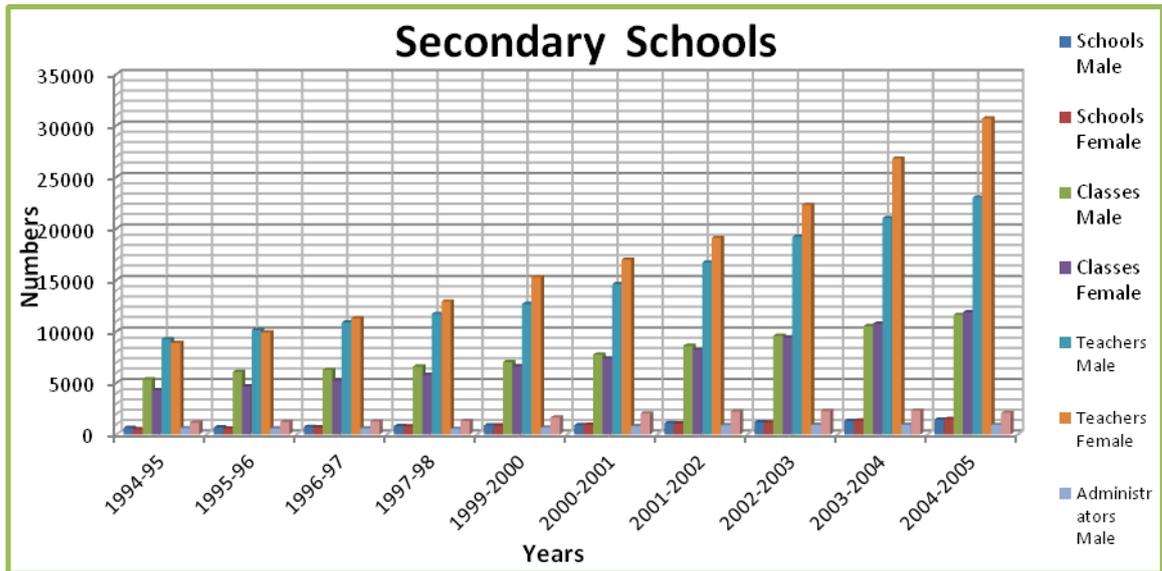


Table 2.14: Quantitative development of secondary education in public and private schools in Saudi Arabia between the academic years of 1994/1995 to 2004/2005.

TABLE 2.15

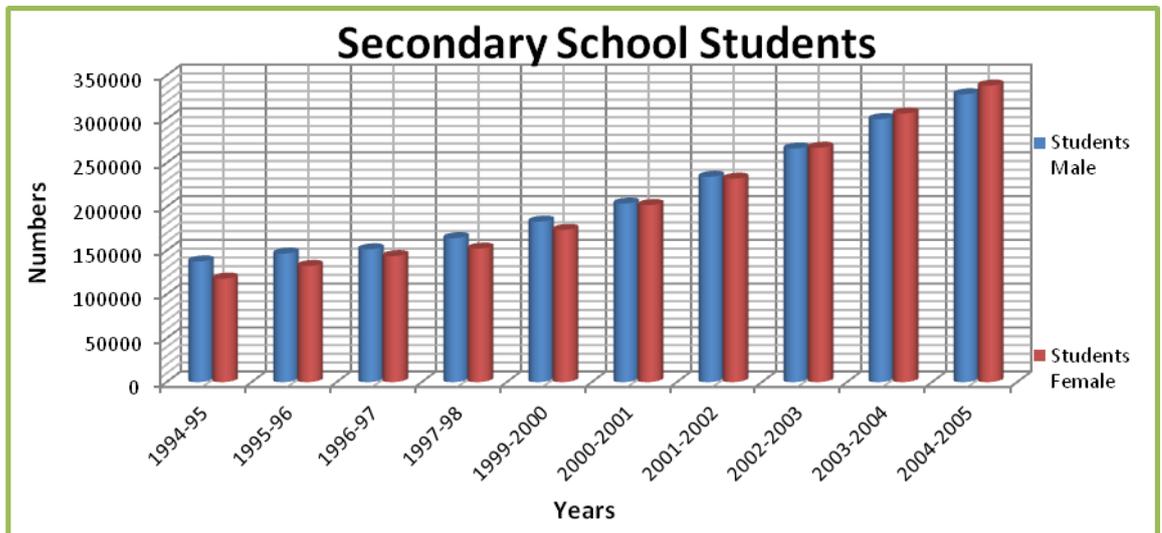


Table 2.15: Quantitative development of secondary education in public and private schools in Saudi Arabia between the academic years of 1994/1995 to 2004/2005. (Student Numbers )

Table 2.15 above indicates that the number of male secondary schools is more than that of female secondary schools. Also, one can note from Table 2.14 that the numbers of male secondary students is greater than the female students; this trend is obvious up until 2002, but by 2003 the number of female students shows increase when compared to the male students. It also highlights a rapid pace of increase in the numbers of schools, classes, students, and teachers. On the other hand, the numbers of administrators have not changed significantly: this remains at the same between the periods of 1994- 2005.

### **Problems in secondary education**

Secondary education in Saudi Arabia has its own problems within the education system. The difficulties noted at elementary and intermediate levels seem to follow the same pattern into high school: the renting of school buildings, soured parent-school relationships and many more. These challenges are summarised below:

*The concept of secondary education has been unstable*

Secondary education has gone through several stages of change in order to improve and develop itself, finally resulting to an overall improvement in most secondary schools. This does not mean that the work is complete, for there is still more room for improvement and the Saudi education system continues to improve itself and welcomes any positive change. The big question is not yet answered, “Is secondary education exclusively committed to preparing students for university or is it expected to provide more?”

*Educational loss*

Secondary education in Saudi Arabia has produced both quantitative and qualitative educational loss. The poor quality of education has meant that a great number of high school graduates fail to be accepted in universities or in proper white collar positions or jobs. The loss in quantity can be estimated from a high dropout rate as well as student failures. In a study held in the Kingdom between 1995 and 1996 it was found that from each 1000 student registered in secondary school, only 744 students would graduate (Al Ghamdi, H. and Abduljawad, N. 2002: 184):

423 students graduated after three years (without failure): 42per cent.

227 students graduated after four years (with one year failure): 23per cent.

94 students graduated after five years (with two years failure): 9per cent.

256 students dropped out without completing their education: 26per cent

The cost of this educational loss was estimated at more than \$ two million.

*Inappropriate secondary school division.*

Secondary school education is divided into three separate categories: General Secondary Education (GSE), Religious Secondary School (RSS), and Technical Secondary School (TSS). This division seems to be outdated, as students graduating from GSE and RSS lack the training and skills which are desperately needed in order to meet with global competition and produce a workforce with up-to-date technical and marketing skills. On the other hand, the Technical Secondary School students need more cultural information to fit in with their culture and Saudi society. Therefore, we need an integrated secondary stage that facilitates proper education to every student in order to help him or her cope with his/her future more successfully.

## ***Conclusion***

The Saudi education system has developed considerably since it was founded in 1967, especially with regards to its aims and objectives. The primary objectives have remained the same throughout its development stages: it can be said that the educational system of Saudi Arabia seeks to bestow the legacy of Islam and the wisdom of the past upon new generations, while training them to meet the challenges of the future.

King Fahd always expressed Saudi Arabia's commitment to providing the country's youth with opportunities to develop their capabilities. Whether their interests are technical, scientific, or artistic, students today have the chance to pursue knowledge in a wide variety of fields, in the most modern educational institutions. King Abdullah is moving the process forward rapidly by sending hundreds of students out of the country to get different kinds of education from the U.K., Canada, the U.S.A., Australia, Japan, Korea, Malaysia and almost every modern country.

It can be argued, therefore, that while it is a system of strong central control, there is an overall vision and driving purpose to the central direction of the Saudi education system, which will be examined further in the next chapter. However, at local level there are certain problems which recur throughout the school system. Some of these, such as the lack of suitable buildings, cannot be resolved by the schools. Other problems, such as parent-school communication and high drop-out rates, can perhaps be reduced by schools which are able to show a clarity of purpose to their stakeholders and possibly target these problems as part of a strategic plan.

The author's personal experience (see autobiographical account in Chapter 1) suggests

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that there is a tendency among Saudi school staff and administrators towards a somewhat passive approach. They await instructions from the Ministry and do not expect to initiate actions themselves. In the author's experience there was little or no planning at school level, and standards of teaching and school ethos suffered as a result. This study will attempt to discover whether implementing strategic planning in the smallest units of the system, the schools, can be achieved, and if so, whether it can help school staff to combat these problems, to take locally based decisions for themselves and to define a vision for their schools.

## **Chapter Three - The Saudi Ministry of Education's Ten Year Plan**

### ***Introduction***

This chapter will consider the Ministry of Education of Saudi Arabia's report of its Ten Year Plan (2004-2014). It is intended to present an updated view of the current efforts in the Kingdom to develop, upgrade, and improve its educational system.

The reasons for setting up a Ten Year Plan in Saudi Arabia will be examined, including plan determinants, general strategies, challenges that education faces in the Kingdom, vision determinants, the Ministry's measurement of outcomes for the Plan and the Ministry's vision, goals and objectives for education in the Kingdom of Saudi Arabia for the next ten years. In addition this part of the research will shed light on the Ten Year Plan's estimated financial cost, and sample aims and their programmes.

This chapter will demonstrate that a strategic planning approach is now being adopted at Ministry level in the Saudi Arabian education system. This approach will be explained in this chapter, prior to the main part of the thesis which will examine the possibility of introducing the same approach at school level. In the schools, the proposed model (MSPM) will play a vital role in interpreting the general goals of the Ministry of Education in the actual field. The training for implementing the MSPM will enable the school administrations to understand the notion of strategic planning and will bring them more into line with the Ministry's vision, goals and objectives.

## ***Background***

The political leadership in the Kingdom has realised that the basis for its strength and success lies in the thinking and creative minds of young people capable of making change and achieving development through the growth of the knowledge they possess. In order to achieve this goal, the Kingdom is seeking to develop, upgrade, and improve its educational system and its outcomes. Hence, it has been necessary to define such objectives and to translate them into national plans and specialised work programmes. An academic educational system is required, which should be able to provide internationally competitive training through programmes that can meet all current and expected needs. It has therefore been necessary to adopt an effective planning approach that will guarantee the successful accomplishment of the described vision and goals.

## **Reasons for Setting up a Ten Year Plan**

Planning is a strategic option which Saudi Arabia cannot do without; it is needed in order to analyse and characterise the existing human and material resources, to invest in them in the least possible time and at the most effective cost, and to successfully achieve goals. Moreover, planning is an intellectual and technological tool that guides educational decisions and supports and enhances productivity, taking into consideration obstacles and difficulties facing the planning process and the adoption of a scientific approach.

A comprehensive plan for educational development is now considered to be a practical and essential requirement in order to achieve the Kingdom's strategic goals for general development. Education is considered to be the main source for the formation of the human capital which constitutes the essential element in all aspects of economic

development. This implies that the educational process is not just a service provided to answer society's demands, but it is also an investment aiming at the improvement of the individual's standard of living and the achievement of the social and economic development of the community. Thus, it is imperative to correlate educational planning with the state's comprehensive plans.

The author of this study was able to advise the Saudi Arabian authorities on the aims of the Plan, The treatment of our educational problems by the adoption of the scientific approach aims at raising the internal competence rates and the performance level of male and female teachers through the creation of programmes for professional training and development and through the revision of course syllabus and course content assessment. In addition, it is important to evaluate teaching methodologies and their approaches. There is also a need to provide school buildings with appropriate educational facilities. It is also important to achieve correspondence between educational outcomes and labour market needs. The accomplishment of these goals will result in the excellence of our education, which (Allah willing) will bring us closer to international levels of competition.

The Plan is addressing the growing increase in the number of both male and female students, and the inevitable demand to grant equal educational opportunities with a high degree of excellence for all citizens from all walks of life in the Kingdom of Saudi Arabia.

## **Plan Determinants and General Strategies**

### ***Challenges that education faces in the Kingdom***

The Ministry's Ten Year Plan has been especially developed to confront the challenges

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that negatively affect and hinder the educational system in Saudi Arabia. Therefore, the planning team was keen to examine the most important of these challenges in order to develop a vision and to establish goals for the Plan. The conclusions drawn from their research were as follows:

*The growing number of students*

Studies indicated that the next decades would witness a further increase in the number of students in Saudi Arabia, primarily due to a growth in population. This would result in an increased demand for education at various stages of development and a need to accommodate children from the age of six onwards. This can be achieved only by improving admission at the elementary level and by providing these individuals with a suitable education.

This problem is considered to be the underlying reason for the preparation and expansion of the educational system and its programmes in Saudi Arabia. The Government will inevitably be faced with an additional financial burden, which will demand the search for and the application of various financing sources.

*Development Requirement*

All the indicators from the seventh State Development Plan hint that education achieved great success in reaching its established goals throughout those years. Moreover, these indicators, and the eighth ambitious plan which is now under way, reveal that the responsibility of education is to prepare human resources that are capable of creating and achieving comprehensive social and economic development for the community. Development requires a highly skilled workforce, and therefore it is necessary to

provide individuals with an education that will effectively meet with societal and economic needs.

### *International Fluctuating Changes*

The effects of globalisation and international fluctuating changes have impacted on all aspects of economic, social, technological, and educational life within the Kingdom. These changes impose various challenges on all fronts of Saudi education in its efforts to successfully meet with international competition and demand. Therefore, there is a growing need to improve education in order for future generations to compete with, and positively interact with, their international counterparts. Studies indicate that the next decade will see an increase in the need for effective strategies to improve the country's ability to deal with international change while maintaining its individuality and cultural values.

The global economy's tendency towards free trade will result in the liberation of service worldwide, including educational services which will deem education and learning as no longer restricted to formal educational state systems, but rather as subject to privatisation and to the private sector's participation. Therefore, the success of education will be evaluated in terms of investment projects in it. This means that the education and learning service sectors will face a great challenge in the presence of strong international and private competition. Therefore, it is imperative for the Ten Year Plan to raise the standard of education as well as to ensure the improvement of its outcomes so that it can compete with other international systems.

### *Knowledge Explosion*

The knowledge explosion that has resulted from the development of technology requires the improvement of the educational system to meet its challenges. That is, it has become imperative to revise the existing syllabi, and to organise knowledge, experiences, and skills to prepare learners for the successful application of technology. Thus, the educational system should be developed to face technological challenges, and to implement technology in various aspects of education.

### *The cultural invasion and its results:*

The development and widespread use of cheap and unrestricted mass media communication constitute a challenge and threat to the Kingdom's national identity and culture. This issue requires a balanced approach that will allow students to enjoy modern technology in order to benefit their own community, while at the same time maintain that community's Islamic faith and protect it from outside risks that may have a negative impact on certain groups within the country as well as its overwhelmingly Muslim population.

## **Vision Determinants**

The ideological framework that has guided the attitudes and determinants leading to the establishment of the Ten Year Plan's vision insists on creating a new generation that has a proper and clear understanding of Islam. Students need to have the Islamic knowledge, skills, and manners to ensure their knowledge of Allah's faith, to build their conduct on His law, and to maintain the fixed Islamic religious basics and the original social and cultural values of Saudi society. At the same time, the Ten Year Plan

determines to generate an education system which will produce a modern workforce capable of dealing with and accepting globalisation. Furthermore, the Ten Year Plan also intends to develop skills which will incorporate invention and productivity to meet with the needs of the labour market. Individuals should have the flexibility to positively confront uncertainty in the future of the international economy and to face up to the challenges that may come with it. They should acquire skills that positively interact and meet with the demands posed by modern society, while at the same time maintaining their Islamic and national identity as Muslims and Arabs. They should be capable of dealing with the increasing amount of information both qualitatively and quantitatively. The 'Ten Year Plan' hopes to prepare for and to meet with the growing demand for education, and thus to provide enhancement and growth for its entire citizens.

### **Corporate strategy and the opportunities presented**

The Ministry of Education has understood that it needs to take into consideration a package of corporate strategy to improve the educational system in Saudi Arabia. It needs to realise that effective participation in education is central to human development and awareness. The increased involvement of the student in the education process and participation in school life will foster independence and creativity. The individual needs to realise that s/he is the first beneficiary and therefore needs to take the lead role in activities regarding his/her learning. The acquisition of knowledge, self-learning and research will prepare students for positive and effective communication and adaptation to growing change brought on by globalisation. An active relationship between home and school is an essential part of the education process. Furthermore, it is also important to update the function of school by increasing its ability to provide students with an attractive, healthy and encouraging environment for learning which

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must also promote acceptance and awareness of global change.

Moreover, it is important to identify and gain support from the existing professional workforce in some aspects of education such as planning, training, establishing and evaluating educational goals. This involves the development of admission and assessment systems in all educational levels, based on the student's ability in learning to achieve the educational standards established for each stage in specific fields. It is also crucial to develop bridges between the various stages of education on the one hand and non-regulated education programmes on the other.

Most importantly, it is fundamental to update the role and task of the teacher as a facilitator of learning. Teachers should be trained and expected to prepare and employ technology effectively in order to promote learning in a free, up-to-date and comfortable environment. This can be achieved only by the creation of new and modern syllabi based on various aspects of knowledge and technology, assisted with up-to-date and efficient materials and resources.

All of these advances will need to be supported and reinforced at local level as well as by directives from central authorities. It is precisely in pursuit of these goals that the author also recommends encouraging schools to develop Plans of their own, to focus their efforts and strengthen the improvement of the education system from below.

### **The Ten Year Plan: preparation and implementation**

According to the nature of the goals and tasks of educational planning, the general administration of the Ministry of Education was commissioned to establish the planning processes, to develop the Ten Year Plan and to follow-up its execution. The planning

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processes were therefore characterised by continuity and connection, and provide a useful example of how such a planning process is carried out on a large scale.

The main stages were as follows:

### *First Stage - Preparation*

This step included assessing previous attempts (plans) and reaching a full understanding of the different aspects involved in the success or failure of these plans; the diagnosis of the current situation and the factors affecting it both negatively and positively. Finally, detailed studies of the existing educational system were conducted, this was required in order to measure its development and its quantitative and qualitative growth. These diagnostic processes were conducted through analytical projection and field studies.

#### 1. Analytical study:

The study after first stage included an analysis of the available scientific sources on work policies, plans, reports, studies, and future visions related to the educational plans of the Kingdom of Saudi Arabia. The study and revision processes concentrated mostly on a set of educational documents, studies, and reports, as follows:

Education policy in the Kingdom of Saudi Arabia.

Development plans and their operational plans (boys/ girls).

Population characteristics of the Kingdom of Saudi Arabia (1421 H).

Annual statistics reports (boys/ girls) (1417-1421 H).

Comprehensive assessment of education in Saudi Arabia (1421 H).

Assessment of literacy and adult education in Saudi Arabia 1422 H.

Education financing and private sector support and activities in Saudi Arabia

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(1419 H).

Educational research and documents from developed countries. Useful information has been taken from these documents about their past experiences in order to establish and develop the Ministry of Education's plans, its vision and goals.

It would also be useful to examine some of the regional and international experiences in the field and their future vision and goals.

## 2. Projection study:

Future projection studies constitute one of the basic requirements of the planning processes in order to determine the rates of expected growth of the number of students and to estimate the need to accommodate them. A projection quantitative study on education in Saudi Arabia during the next ten years was conducted.

## 3. Field studies:

### A. Study of the educational reality at education administrations:

The study aimed at obtaining quantitative and qualitative data regarding the status of education in order to examine the level of internal competence. Data was collected from different educational administrations and analysed to determine the required scientific course of action, in order to establish and boost the chances of the Ministry's forthcoming Plan to succeed.

### B. Field studies:

To provide a comprehensive report about the reality of different educational fields, it was necessary to establish a direct contact with those executives

involved in the educational process to obtain in-depth knowledge of their views. This was achieved through a number of interviews about field problems and real needs. A sample study was selected from the education administration to represent the Kingdom's various areas (boys/girls). The sample categories included the General Director of Education, his assistants, educational supervisors, school principals, their deputies, teachers, students, and attorneys. The data collected in the interviews provided information about these professionals' general attitudes and needs. In addition to this study, five hundred questionnaires were distributed to samples of people working in the educational field, students, and attorneys at all education administrations (boys/girls) to investigate their views about the educational reality for the future, and their suggestions to face the existing problems.

#### *First stage - Conclusions*

Analytical, projection and field studies produced a comprehensive and detailed account of the reality facing the planning process, together with an in-depth guide to help achieve the aims and objectives of the Ten Year Plan. They highlighted the prospect of change that might occur in the future and its possible repercussions on education, as well as giving some indication of the depth and range of new attitudes that this change would bring along with it. The studies gave a statistical prediction of the expected growth in population and estimated its impact on education. They also gave an accurate and comprehensive survey of the educational system and its potential and limitations to accommodate issues such as the growing number of students and teacher training, as well as other qualitative and quantitative needs for the successful execution of the Ten Year Plan. The research provided an indication as to the growth rate at each stage of the

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plan, the associated material cost, admissions (calculated in percentages) and other specific requirements to help foresee the smooth running of the Ten Year Plan.

*Second Stage: Vision and goal specification*

The second stage entailed the specification of the basis for the plan within the framework of Saudi culture, the Kingdom's Islamic faith, and the political, economic and social attitudes. After the efficient examination of the educational system and its diagnostic status, a group of governing and guiding strategies was established to direct education in the Kingdom. The Plan's foundation was guided by a vision resulting from the information gathered in the studies.

After ensuring the suitability and appropriateness of the plan's vision, the team established general and detailed goals for the Ten Year Plan. While specifying the goals, the team agreed that they should be scientifically accurate. Moreover, they also specified the methodology to be adopted to realise the plan's vision. The specifics of Saudi society such as religious views, social norms and values were taken into consideration, in addition to the powerful role of the student in the educational system. Correspondences between abilities and aspirations were determined, while specifying detailed goals as well as the vision's flexibility and its ability to cope with future changes and innovations.

The vision and goals were revised in several meetings with the scientific team and then they were presented to a consultant team which was composed of representatives from society. The vision and goals were sent for consultation to the Ministry's officials, headed by his Excellency the Minister Dr, Mohammad Ben Ahmad AL-Rasheed, in addition to about forty officials in the Educational Work Leadership (male, female) who

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represent the party that makes educational decisions to achieve goals and objectives. In addition, the vision and goals were submitted to a group of specialists for further analysis and suggestions, to enrich the project, and to determine connections between the specialisations by perusing them. Once the research main team had collected these views, they proceeded to carefully examine them to extract fundamental conclusions from them and to modify the original project in view of the new information gathered.

*Third Stage: Setting up an action plan*

At this stage, the vision and goals were translated into objectives presented in digital images and indicators of the goals to be achieved. Then, detailed work programmes and projects were established and organised according to priority. In addition, at this stage, co-ordination and integration between the programmes and the projects were taken into consideration, as well as the specification of time to execute the programmes, their costs, funding sources, possible changes, and suggested alternatives to face them. All these processes were completed in workshops attended by every sector in the Ministry, of which the members of the main team and the consulting team formed part.

*Fourth Stage: Dissemination of the action plan*

This stage involved sending the draft plan to the various sectors of the Ministry. The Ministry's approval of the plan's goals and programmes was followed by a comprehensive co-ordination process and by the specification of the basic and supporting bodies to execute the plan's programmes and projects, to determine specific roles and tasks, and to estimate the supply of human resources and the financial requirements for the execution of such programmes and projects in the projected ten-year period of the plan.

The results (i.e., the indications and features of achievement for each specific programme or project) were determined by a team who established achievement measures.

In the planning processes, the following aspects of the plan's commitment were taken into consideration:

1. Extending participation to embrace all those people who would benefit from the vision's outcome.
2. Benefiting from the results from previous experiences, innovating for the educational future, the labour market's needs and the relationship between them.
3. Co-ordination with authorities of various types and levels to secure the vision's development and the plan's requirements.
4. Establishing the vision in view of the achievement of reactions between the outcome of general education and the beneficiary parties on one side and the educational institutions that may serve the community's needs on the other.
5. Allowing for flexibility to accommodate continuous changes and innovations in order to meet the persistent needs of educational development.

*Fifth Stage: Introducing the plan to the experts*

At this stage, the plan was submitted to experts inside and outside the Kingdom (a group of experts from Arab countries and other international experts) for consideration, in order to secure the validity of its scientific structure. The vast majority of the experts agreed with the plan's perfect scientific nature, which they deemed would actualise the

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concept of strategic planning. In addition, they expressed their approval of the new methods adopted in setting plans for the development of the educational system. The plan's team applied the experts' remarks to improve its assessment and to guarantee its quality.

*Sixth Stage: Estimating the financial requirements for the plan's execution*

At this stage, the cost of the programme was estimated and the project as received from the Ministry sectors was revised by a team formed particularly for this purpose. The team was composed of the General Director of Education Budget (for the male sector), the Budget's General Assistant Director (for the female sector), the Director of Educational Planning, and the Director of Administration Planning. In estimating the cost of the plan's programmes, the team was guided by rationality and practicality. In addition, it created a list indicating every requirement for the programmes and projects to be completed in the plan's ten years.

*Seventh Stage: Approval, dissemination, and execution of the Ten Year Plan.*

This stage entailed the delivery of the final Ten Year Plan and of its attached studies (the projection study; the quantitative and qualitative studies, and the failure and drop-out study) to the Minister of Education, as well as the guide to the Plan with its terminology, course for its execution, and follow-up measures. The Minister of Education's decision no.1581/1/5 dated 17-3-1424H approved the Ten Year Plan. The decision stated that the application of the plan should be effective in the year 1425H, to coincide with the state's eighth development plan.

The decision commissioned the Educational Planning General Administration to carry

out the comprehensive preparation of the first year of the Plan, and it stated that the education administrations in all areas and governorates in the male and female sectors should establish their executive plans for the first year in accordance to the Ministry's comprehensive Plan. This was supported by the experiences of the general administration of educational planning, whose responsibility also included the publication and distribution of the Plan to the concerned parties and the design of a computer program through the Ministry's net, and to be placed on the Ministry's site for the Plan's follow-up.

### **The Ministry of Education's vision in K.S.A.**

It can thus be seen that the Saudi government has embraced strategic planning for education at the highest level, and that its Ten Year Plan is driven by a clear vision for Saudi education. However, as will be seen in the interviews with senior management personnel, it has not been envisaged that the concept would be taken up at the local level of individual schools. This thesis aims to show that involving schools in their own strategic planning is actually contributing to the Ministry's overall strategic plan, by bringing the school staff to the appropriate level of understanding to grasp the concepts of strategic planning and thereby accomplish the Ministry's vision, goals and objectives.

It is also important to note the centrality in the vision of the Ten Year Plan, as in all Saudi educational policy, of the knowledge and beliefs of the Islamic faith. The vision for the Plan has been clearly defined and stated, combining both values and practicalities:

**“By Allah's will, at the end of year 1434H, the Ministry of Education's vision will be realised in:**

**The graduation of male and female students with Islamic values and appropriate knowledge and practice in their chosen subjects of study. These students will have acquire practical knowledge, skills, and attitudes; they will be able to positively react to and face modern changes; they will be able to apply advanced technologies with efficiency and flexibility and to deal with international competition in scientific and practical fields. Their positive participation in an efficient educational system will allow them to develop appropriate abilities and attitudes and to spread the positive spirit of work, in school environments that encourage learning and social education.”**

It will be seen in the next chapter that, unlike many earlier planning concepts, the model of strategic planning proposed in this thesis (MSPM) enables a school to place its vision and values at the centre of its plan, and thus is, again, in tune with the Ministry's strategy.

## Chapter Four - Literature Review

### Introduction

It can be argued that planning is not only a very important task in the educational process, but it is also urgently required for the success of any operation or project. Planning has therefore been a chief concern of many administrators. Most of the school administrators in Saudi Arabia have recognised the importance of planning relating to responsibilities for running day-to-day school activities and improving school outcomes. If the following question is asked of any school principal or educational executive: “Do you believe that planning for your activities is imperative and essential for your success and achieving excellence?” The answer would certainly be “Yes”.

However, the answers would be quite different if more detailed questions were asked such as:

“Why do you need a plan?”

“How do you formulate a plan?” or

“What are you utilising planning for?”

Most of the answers would be likely to contain generically the concept of strategic planning within their contents, but answers would be quite vague and would lack a detailed understanding of strategic planning. This would be because most school principals have not been thoroughly exposed to the concept of implementing strategic

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planning in their schools. Therefore, a primary purpose of this literature review, besides setting the research in context, is to introduce the notion of strategic planning as one might introduce it to Saudi educators, and to head teachers in general, by conceptually exploring the notion of strategic planning in both the business and education spheres.

Additionally, I will explore the need to utilise the appropriate strategic planning models in schools in Saudi Arabia. The literature review found no comprehensive studies that specifically examined the notion of strategic planning in Saudi schools. Therefore, another primary objective of this literature review is to be able to recommend and suggest appropriate strategic planning models for implementation in Saudi Schools, thus linking back to the main aim of the research.

Hence, this chapter introduces, discusses, and explores thematically the literature concerned with the development and the notion of strategic planning in education in general and in schools specifically. This will shed light on the following:

- the historical development of strategic planning;
- the concepts and definitions of planning, strategy and strategic planning;
- the distinction between strategic planning and other long term planning approaches;
- an examination of several models of general and educational strategic planning;
- the advantages and limitations of educational strategic planning processes;

A suggested model for school strategic planning will be presented in the following chapter.

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The compilation of the literature review starts by examining what was available on the Internet. By typing into a search engine terms such as ‘strategic planning’ and then focusing the search to ‘education’ or ‘school,’ a mass of information was provided (349,000 hits for education and 113,000,000 for school), most of which was not very useful. However, it did establish a sense of the great interest in this subject. The literature review then used publication search engines, such as ‘Proquest’, for current peer review articles. The website of the Society for College and University Planners (SCUP) a prominent organisation that strictly focuses on planning in higher education (SCUP, 2003) emerged as an important source. Using the past five years of their magazine, *Planning for Higher Education*, was valuable in identifying both relevant sources and current concepts. The University of London Libraries such as Goldsmiths Library, The Institute of Education Library, the SOAS Library, and others were used as sources for strategic planning books and articles.

The literature review has tried to include the more prominent and current contributors and leaders associated with strategic planning. Therefore, this review contains names such as Johnson, Scholes, Bryson, Mintzberg, Fidler, Drucker, Birnbaum, Ahlstrand, Sherman, Keller, Meyer, De Wit, Lampel, Ramsden, and Coleman.

In order to deepen our understanding, a brief examination of the historic roots of strategic planning is needed.

### ***A brief examination of the historic roots of strategic planning***

According to many authors and writers on the subject, ‘strategic planning’ originated in the military sphere. Albalabaki, (2001) in the Arabic Dictionary *Almourad* explains strategy as ‘the art of managing the war’. Blackerby (1994) states that the term derives

from the Greek *strategos*, which means literally ‘general of the army.’

...each of the ten ancient Greek tribes annually elected a *strategos* to head its troop. At the battle of Marathon (490 BC), the *stratego*i advised the political ruler as a council. They gave ‘strategic’ advice about managing battles to win wars, rather than ‘tactical’ advice about managing troops to win battles. In time, the job of the *stratego*i grew to include civil magisterial duties as well, largely because of their status as elected officials. (Blackerby, 1994: 23).

Much of the early literature associated with strategic planning, as identified by Bracker (1980), is derived from examining leaders of the military and political affairs, as they were tasked to develop plans and integrate resources in response to the threats and challenges of the external environment (Copeland, 1985:46).

Since then, almost all countries and states have utilised some types of strategies and techniques to lead their armies to victory. The Roman, Chinese, Spanish and British Empires had their special strategies to win wars against their opponents. Strategic thinking developed gradually in the military literature and moved increasingly to the business world. Nevertheless, since the overall impact of success or failure in war and the associated government implications have great consequences for a nation, many people studied the systems and processes the military used to develop and execute its plans.

Eventually, as businesses became larger and more complex, its leaders began to study and adopt strategic planning concepts and processes used by the military. This was particularly true during the industrial revolution, as companies greatly expanded in size and complexity (Wren, 1973:18).

It can be noticed that the interest in historical military strategic planning continues to this day. For example, the popular business-focused book, *The Strategy Process*, by

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Mintzberg and Quinn (1991), begins with an examination of military planning and strategic thought from such military strategists as Alexander, Von Clausewitz, Napoleon, Von Schlieffen, and others. Most authors and researchers have identified clearly that strategic planning is deeply rooted in military thinking and has gradually developed into the business world over the last few decades.

### ***Evolution of strategic planning into business***

Strategic planning and strategy emerged as key concepts within business between the end of the 1950s and the beginning of the 1960s. The focus ‘... at the end of the 1950s and in the 1960s, was on the best way to plan the development of large, multi-product firms. (...) This was the province of classic Strategic Planning at the Centre’ (Kock, 2000:8). In 2000, Richard Kock gave a quite detailed history of strategy, strategic thinking, and strategic planning in business in the *Financial Times Guide to Strategy*. He argued that strategic planning can be traced from the 1920s when Alfred Saloan reorganised General Motors, although he did not publish his account *My Years With General Motors* until 1963.

Walker (2004) also argues that strategic planning methodologies for private businesses started in the early 1920s, but suggests that this originated when Harvard Business School developed the Harvard Policy Model. Walker supposes that our understanding of strategy as practised in management has been transformed. However, one element remains the key and that is ‘aim to achieve competitive advantage,’ suggesting that strategic planning over the years became an essential part of business development. Nevertheless, Mintzberg (1994) illustrates the emergent phases of Strategic Planning in organisations, noticeably saying that:

Strategic planning originated in the 1950s, where it was appreciated in business planning, and was very fashionable and widespread between the mid-1960s to mid-1970s, when people then believed it was the answer for all problems, and most of the American corporations were ‘obsessed’ with strategic planning. Following that ‘boom,’ strategic planning was cast aside and abandoned for over a decade. The 1990s brought the revival of strategic planning as a ‘process with particular benefits in particular contexts.’ (Mintzberg, 1994:4)

According to Richard Kock, it is also possible that:

Peter Drucker set the Strategy ball rolling much earlier. Drucker’s book in 1946, *Concepts of the Corporation*, looked at General Motors, as well as General Electric, IBM and Sears Roebuck, and concluded that the most successful companies were centralised and good at goal setting. Drucker was also the first to see that the purpose of a business was external, that is, in creating and satisfying customer needs’. (Kock, 2000:8)

Richard Kock argues also, that whether ‘Strategy’ was born in 1921, 1946 or later, it definitely grew to powerful adolescence in the 1960s. The first half of that decade witnessed different considerations on Strategy in academic divisions.

...*Marketing Myopia* in the Harvard Business Review in 1960, an article by Theodore Levitt, was one of the first efforts to understand strategy from a fundamental and major perspective. In 1965 came an extremely important book of strategic planning, H. Igor Ansoff’s monumental *Corporate Strategy*, a thoughtful and incredibly detailed blueprint for planning a firm’s objectives, expansion plan, product-market positions and resource allocation. (Kock, 2000:6)

In terms of progress, according to Kock, the ‘best period’ of thinking about Strategy was approximately from 1960 to 1973. Additional, logical progress has continued since. In terms of books, the most important in the 1970s were *The Nature of Managerial Work* (1973) by Henry Mintzberg, and *Strategic Management* (1979) by H. Igor Ansoff. The 1980s saw the emergence of two other writers who have influenced and deepened our view of Strategy: Michael Porter and Kenichi Ohmae. Porter blasted to fame when he published his very important book in 1980, *Competitive Strategy: Techniques for*

*Analysing Industries and Competitors*, Porter argued that:

... the profitability of corporations was determined not only by a firm's relative competitive position (as Henderson had proved), but also by structural characteristics of the firm's industry, which could be described in clear micro-economic terms' (Kock, 2000:8).

Ohmae, a multinational Japanese, described quite brilliantly how Japanese companies had benefited by using strategy consultants or Western academics. His 1982 book, *The Mind of the Strategist: Art of Japanese Business*, is compulsive reading and still one of the best explanations available of how strategy is most effective when it combines intuition and willpower in the pursuit of global dominance (Kock, 2000:8).

Richard Kock states that in the past ten years or so, important new contributions to strategic thinking have been made by Gary Hamel and C. K. Prahalad, John Kay, and by a group of three writers from the Ashridge Strategic Management Centre - Andrew Campbell, Michael Goold and Marcus Alexander. In 1989, Gary Hamel of the London Business School and C.K. Prahalad wrote a very well-known article entitled *Strategic Intent*. They argued that successful companies had ambitions out of all proportion to their positions and had a commitment to change the rules of the game. The following year, Prahalad and Hamel argued in another article, *The Core Competence of the Corporation*, that the real key to strategy was '... a firm's distinctive skills, technologies and assets and its collective learning ability. Professor Kay and others have elaborated this 'resource-base' view of strategy' (Kock, 2000:7).

Goold, Campbell and Alexander's publication in 1994, *Corporate-Level Strategy*, was for the most part accepted as a new way of thinking and a fresh approach which argued that:

The corporate centre should be seen as a 'parent' and develop 'parenting

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skills' to help its operating companies, and that unless the centre comprised the best possible parent for each business, they should be divested ( Kock, 2000 :7).

In summary, it can be seen that the notion of strategic planning has developed enormously during the last decade, as evidenced by a huge business literature founded on several schools of strategic thinking and on implementing the ideas of strategic planning into reality through different action plans. Strategy in business, however, has been focused on competitive advantage; this is not always the best approach for other kinds of organisation.

### ***Evolution of strategic planning into higher education***

From business, strategic planning began migrating to education, mostly through the private and higher education systems.

It is argued by various researchers that the need for strategic planning in higher education was advocated in the early 1980s by many academic associations such as the National Center for Higher Education Management Systems. Birnbaum and Dorris agree that strategic planning was introduced into higher education in the 1980s by Keller. Dorris (2003) states that Keller's 1983 work is repeatedly mentioned in articles and books nowadays:

The concept of Strategic Planning in higher education generally came to the forefront of the academy in the early 1980s with the publishing of the seminal work titled, *Academic Strategy*, by Keller (1983). For example, *The New York Times* and *Change Magazine* considered this as the most influential higher education book in the decade (Dorris, 2003:31)

Birnbaum declares that, historically, higher education administrators adopted many of the practices or processes used by either the government or the military in order to better manage their institutions:

which range from the planning, programming, and budgeting system to management by objectives to zero base budgeting. In addition, Keller (1983) identifies that the planning required in academia is more like the planning that occurred in the military in the 1940s, where there was an agreed-upon strategy rather than an imposed blueprint (Birnbaum, 2000:46).

Similarly, Alexandra L. Lerner (1999) argues that there are considerable needs for strategic planning in higher education, and the concept of ‘university-based strategic planning’ has been initiated in higher education and private education. Lerner adds that, during the 1980s and 1990s, institutions of higher education had to confront numerous changes in their external and internal environment, and respond to rising demands such as decreasing financial support, rapid technological advances, changing demographics, and outdated academic programmes. As a result, many universities engaged in strategic planning as a means to ‘make beneficial, strategic changes to adapt to the rapidly shifting environment’ (Lerner, A. 1999: 5). Strategic planning within universities has not been successful in every case:

...as only few were able to achieve significantly successful results and transformed themselves dramatically. Others have been able to make important changes in parts of their operations. However many institutions have stumbled, dissolved into controversy, or lost their nerve’ (Rowley, Lujan, and Dolence, 1997:53)

This argument was supported by Lerner when she explains that:

Although several authors have endeavoured to explain successes and failures of strategic planning in higher education, scholars differ in their opinions. As a result, there is no consensus (or clarity) on major determinants of strategic planning’s success in universities’. ( Lerner, A. 1999:6).

### ***Evolution of strategic planning into school education***

To what extent is it useful and successful to implement strategic planning in a private or public school environment? Fiddler (1996), Byars (1991) Hanson and Henry (1992) are certain that strategic planning is applicable to the field of education as to any other organisation. Perrott (1996) argues that it is very important for public sector organisations to look to the private sector for guidance in order to meet their new challenges. Tsiakkiros and Pashiardis (2002) go beyond that and conclude: ‘Strategic Planning can be effectively implemented in education to a great extent.’ (Tsiakkiros and Pashiardis, 2002:17)

However, in the Saudi Arabian context, this belief had not yet reached educators when the present author wrote, in 2001:

Most head teachers thought that Strategic Planning was inapplicable and unachievable to implement in Saudi schools. Furthermore, most of them argued that they supposed that Strategic Planning could be related only to the top management administrators.<sup>8</sup> (Makhdoom, 2001:6).

Valentine expressed a similar conclusion to this finding in 1988 in his study in Maryland, USA, when he stated that:

It was concluded that at present, and under present conditions, effective Strategic Planning is not likely to occur in school systems in Maryland. All school systems meet some of the criteria required for strategic planning, but none of the systems meets all of the criteria (Valentine, 1988: 412).

Moreover, Howard Green argued that, ‘the effective delivery of management development must begin with strategic planning at several levels in the education

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<sup>8</sup> Top management administrators: represents the Saudi supreme authority for educational policies and the Ministry of Culture and Education.

service’, which was clearly not yet the case in the above examples.

In the UK, in contrast, strategic planning has for some time been recognised and accepted as an important feature of educational administration. For example, Thody defines the duties of a school governor as: ‘Product management, strategic planning, personal management, financial management, public relations, and quality control’ (Thody, 1992: 9). Furthermore, Thody suggests the appropriateness of this concept in her definition of strategic planning for schools: ‘The tasks here are to set the aims and objectives for school, plan how those aims will be achieved, draw up a development plan and encourage innovation’ (Thody, 1992: 10).

Although strategic planning was not yet in use, Tsiakkios and Pashiardis (2002), in their study of the Cypriot education system, emphasised the importance of implementing it, and argued that it could be effectively implemented in the educational system, stating:

If we want education to improve and be able to meet the demanding challenges of the new millennium and survival in the long term, then strategic planning should be adopted without any further delay (Tsiakkios and Pashiardis, 2002: 16 )

The above examples from the literature, including the author’s own observations, suggest that strategic planning can be applied to more school systems in more countries than it is at present, and that it is desirable. In the case of the Saudi education system, it can indeed be argued that implementation of strategic planning is crucial, owing to the extreme pressures on this particular system as a consequence of economic, social and cultural globalisation factors. Fortunately, as has been seen from the previous chapter,

the concept of overall strategic planning is now deeply embedded in the core of the Ministry's Ten Year Plan, which consists of a new mission, goals, and objectives for the education system as a whole. It remains to be seen whether the concept can be successfully adopted at the level of individual schools, as this research will explore.

The author's previous research on the subject suggested that, at school level, the notion was still vague, it had not been appreciated and faced considerable resistance by most of the head teachers who often did not approve of long-term planning. During an interview conducted in 2001, the Head of the School Administration Departments in the Ministry of Education indicated that: 'only three schools in the entire kingdom have been implementing strategic planning concepts' (Makhdoom, 2001:8). It would appear that, since then, more private and public schools have attempted to implement different strategic planning models, but the literature does not include any research that has studied these more recent efforts.

### ***Concepts of planning and strategy in the business context***

Mintzberg (1994) states that a plan to most people is 'a guide, course of actions, or a path to get from here to there' (Mintzberg, 1994:23). Planning to some people is **future thinking**, but to other managers planning is **controlling the future**; finally, Mintzberg arrives at an inclusive definition of planning, and that is 'planning is a formalised procedure to produce an articulated result, in the form of an integrated system of decisions' (Mintzberg, 1994:12).

Quinn (1980) defines strategy as 'the pattern or plan that integrates an organisation's major goals, policies, and action sequences into a cohesive whole' (Quinn, 1980: 7). Mintzberg says that strategy is a plan; strategy also is a pattern that is consistency in

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behaviour over time; strategy is position, strategy is perspective, and strategy is ploy. Finally, he summarises: ‘strategy formation is a planning process, designed or supported by planners, to plan in order to produce plans’ (Mintzberg, 1994:32).

Johnson and Scholes (1993) argue that strategy is to do with various consequences such as: the scope of an organisation’s activities; the matching of the activities of an organisation to the environment in which it operates; the matching of the organisation’s activities to its resource capability; the implications for the organisation’s major resources; the effect of the operational decisions; the power of the stakeholders’ values and expectations; and the long term direction of the organisation. They conclude that:

Strategy is the direction and scope of an organisation over the long term: ideally, which matches its resources to its changing environment and in particular its markets, customers or clients so as to meet stakeholders expectations (Johnson and Scholes, 1993:10).

Johnson and Scholes (1993) also argue that strategies will exist at three levels in an organisation. The first level is the **corporate level**, which is about the overall scope of the organisation and how it is to be run in structural and financial terms. The second level can be described as **competitive or business strategy**, which is about how to compete in the market. The third level is the **operational strategy** which is at the operating end of an organisation and concerned with... ‘How the different functions of the firm - marketing, manufacturing, finance - contribute to the other levels of strategy’ (Johnson and Scholes,1993:11)

Hax and Majluf (1986) arrive at a comprehensive definition of strategy when they state that:

a strategy becomes a fundamental framework for an organisation to assert its vital continuity, while, at the same time, forcefully facilitating its adaptation to a changing environment. The essence of strategy thus

becomes the purposeful management of change toward the achievement of competitive advantage in every business where the firm is engaged. (Hax, and Majluf, 1986: 7).

They agree that the final target of strategy is to address stakeholders' benefits. Therefore, they are arriving at the same point as Johnson and Scholes and that is to meet stakeholders' expectations.

De Wit and Meywrs (1994) had almost the same definition of strategy, which is:

a fundamental framework through which an organisation can assert its vital continuity, while at the same time purposefully managing its adaptation to the changing environment to gain competitive advantages.....Therefore, the ultimate objective of strategy is to address stakeholders' benefits-to provide a base for establishing the host of transactions and social contracts that link a firm to its stakeholders.' (De Wit and Meywrs, 1994:12).

Again, they agree that the final target of strategy is to meet stakeholders' needs.

Jim Knight, in his book *Strategic Planning for School Managers* (1998) considers that strategy should involve a lot more than the normal, day-to-day improvement of organisational effectiveness. Rather, he believes that:

Strategy is to include something more of speculation about a range of possible but well-defined futures than is easily promoted by a review which is firmly located in the desire simply to improve current practice.

Eventually he concludes that the consideration of strategy 'requires a willingness to suspend belief in present practice (however good that is) in the search for a possibly more meaningful future'. (Jim Knight, 1998:4)

In *The Manager's Guide to Strategy*, Formisano defines strategy as 'a detailed plan for achieving success, the bundle of decisions and activities that we choose to achieve our long term goals' (Formisano, 2003:2) . However, this definition is really describing the

organisation's action plan more than the organisation's strategy.

Fisk and Barron, (1984), in '*The Official MBA Handbook*'<sup>9</sup> state that 'Strategy is a way of comparing your organisation's strengths with the changing environment in order to get an idea of how best to complete or serve client needs'. They add that, essentially, there are three different categories of strategy: **organisational**, **programmatic**, and **functional**.

The difference among the categories is the focus of the strategy. **Organisational** strategy outlines the planned avenue for organisational development (e.g., collaborations, earned income, selection of businesses, mergers, etc.). **Programmatic** strategy addresses how to develop, manage and deliver programs (e.g., market a prenatal care service to disadvantaged expectant mothers by providing information and intake services in welfare offices). **Functional** strategies articulate how to manage administration and support needs that impact the organisation's efficiency and effectiveness (e.g., develop a financial system that provides accurate information using a cash accrual method)<sup>10</sup>

Brian Fidler (2005) has argued that strategy as a concept is vague and to a certain extent hard to explain. He recalls the origin of the concept in military situations where it served to differentiate between an overall plan of action and its component parts which were the tactics:

The term strategy incorporates both a strategic aim and the means of achieving that aim. It is the destination and the route map to get there It is

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<sup>9</sup> <http://www.allianceonline.org>

<sup>10</sup> [www.allianceonline.org](http://www.allianceonline.org)

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the broad overall direction that an organisation wishes to move in. (Fidler, 2005: 9).

### ***Definitions and concepts of strategic planning***

From the literature review it appears that the term *strategy* has in the past been used interchangeably with the term *strategic planning* in different references, although in its modern usage, strategic planning implies a very different understanding and view of the concept from strategy. Drucker (1974) argued that the combined use of planning and strategy achieved important fame and enhancement in business with the management boom that spread over the United States and the world after World War II. Drucker added that:

The broad category of planning was divided into short-range and long-range planning. The focus of long-range planning was more on the question: ‘What should our business be?’ and short-range planning more on ‘What is our business?’ and ‘What will it be?’ (Drucker, 1974: 122).

As the responses to these questions were combined and integrated, the concept now known as strategic planning was further developed. Drucker (1974) defined strategic planning as:

The continued process of making present entrepreneurial (risk-taking) decisions systematically and with the greatest knowledge of their futurity; organising systematically the efforts to carry out these decisions; and measuring the results of these decisions against the expectations through organised systematic feedback (Drucker, 1974: 125).

This definition highlights the significance of an organised decision-making process, and how it can be carried out systematically to reduce risk.

On the other hand, Keller (1983) mentioned in his definition of school strategic planning that the importance of the process was to deal with the changing nature of schools or universities. Keller defined school strategic planning as:

An academic, strategic, active, stimulated decision making process carried out by Schools' and Universities' leaders which looks outward and is focused on keeping the institution in step with the changing competitive environments in which a blend of rational and economic analysis, political manoeuvring, and psychological interplay and concentrates on the fate of the institution above everything else. (Keller, 1983:151)

The definition of strategic planning for Cooper (1985) was: enlightening the analytical features of the organisational environment, and learning how to deal with future needs and contingencies by saying that strategic planning is:

The method by which an organisation identifies relevant trends in its environment, analyses their potential implications, and projects an integrated strategy to address these future events and their contingencies. (Cooper, 1985:1)

One year later, McCune defined strategic planning as:

A process for organisational renewal and transformation ... (which) provides a framework for improvement and restructuring of programs, management, collaborations, and evaluation of the organisation's progress' (McCune, 1986:34)

It can be noticed from McCune's definition that she was laying emphasis on the aims of strategic planning as renewal and transformation.

Another definition of educational strategic planning, by Brown and Marshal, was published in 1987. In this definition, they described the steps of the educational strategic planning process, relating it to a change in understanding and educational improvement.

Their definition of educational strategic planning was:

A process that is designed to move an educational organisation through the steps of understanding changes in the external environment, assessing the internal strengths and weaknesses of the organisation, developing a vision of the desired future for the organisation and some ways to achieve that mission, developing specific plans to get the organisation where it is to where it wants to be, implementing these plans and monitoring that implementation so that necessary changes or modifications can be made' (Brown and Marshall, 1987:3)

Cawelti (1987) abbreviated his definition of educational strategic planning to the leaders' vision and how it should serve their students, saying that strategic planning is '... a process deliberately designed to help leaders conceive of the kind of institution they would like to create to serve their students' (Cawelti, 1987:7)

Similarly, the definition offered by Pfeiffer, Goodstein, and Nolan (1989) was related to the vision of the organisation's leaders or guiding members, and how they could improve the decision-making process and set their priorities. They defined strategic planning as:

The process by which the guiding members of an organisation envision the organisation's future and develop the necessary procedures and operations to achieve that future. The vision of the future provides both a direction and the energy to move in that direction ... successful Strategic Planning is characterised by organisational self examination, confronting difficult choices, and setting priorities (Pfeiffer, Goodstein, and Nolan, 1989:56)

Likewise, Mecca and Adams (1991) connect the process of strategic planning with the district planners and their anticipation of the future goals and alternatives. They illustrate strategic planning by using information about emerging trends and developments, gleaned through a process of environmental scanning:

[the strategic planning process] ... allows district planners to anticipate plausible alternative futures from which to derive appropriate strategic goals. These goals form both the district's collective 'visible' for the future and a basis for ongoing operational planning and management (Mecca and Adams, 1991:16)

Valentine (1991) defines strategic planning through the reimbursement of the process. He gives details about the outcomes and benefits that can be achieved from strategic planning, connecting the process with the organisation's successful change, and saying that it:

...Leads to the identification of a sense of direction for the organisation;

helps assess internal and external environments, and provides a unified direction to the planning function. Skilful application of the techniques of strategic management can bring an organisation's goals into focus. Administrators can then see immediate results and at the same time anticipate future trends. Conceptually, strategic management provides a framework for successful organisational change (Valentine, 1991:2)

In 1992, Aurora Public School District defined strategic planning as:

...a creative management process powered by the basic human drive to solve problems and to eliminate, discrepancies between what is and what must be. It forces people and institutions to re-examine, to refocus, and to seek out or create new means of accomplishing their purposes (Aurora Public School District, 1992:7)

Cordell and Waters summarised the whole operation of strategic planning as '... a community-based and on-going process of imagining a preferred future and then developing the strategic and operational actions required to make that future a reality' (Cordell and Waters, 1993:27)

The definition of strategic planning that came from The Strategic Planning Roundtable in 1994 was very simple and could describe planning in general. They confirm that strategic planning is '.. a series of planned steps to move a school district from its current state to a desired future state' (Strategic Planning Roundtable, 1993:4)

Cook (1995), however, defined strategic planning in a somewhat inspirational way, as focusing on the vision of the organisation: 'The means by which an organisation continually re-creates itself toward extraordinary purpose' (Cook, 1995:41).

Kaufman's definition concentrates more pragmatically on the organisation's customer or client:

... in its most powerful form [strategic planning] starts with society as the primary client and beneficiary and then rolls down from that to identify what any organisation commits to deliver. This approach assures the

linkages among what organisations use, do, produce, and deliver, and external consequences (Kaufman, 1996:61)

Romney sees the purpose of strategic planning as clarifying the organisation's requirements for the process, adapting to change and moving towards better control, saying that it is:

... a practical process for dealing with the ambiguities of the environment. Its purpose is to move the organisation from being a pawn to changing events to being a proactive participant, making decisions about and acting to create its own future. It requires organisational flexibility to adapt and revise as conditions change, and a willingness to move beyond obsolete paradigms (Romney, 1996:14)

Wincek and O'Malley (1997) define school strategic planning by the school community's contribution to the process:

...a process that draws together the thinking of the community and gives stakeholders an opportunity to articulate their hopes for the future of the school, address issues that need attention and come to agreement on priorities' (Wincek and O'Malley, 1997:20)

An additional definition of strategic planning located from higher education literature is:

'...a formal process designed to help an organisation identify and maintain an optimal alignment with the most important elements in its environment' (Rowley Lujan, and Dolance, 1997: 15).

Bryson (2004) acknowledges that in the past four decades strategic planning has become a normal part of management thinking and practice in the business world. However, he points out that the past two decades have been the era of strategic planning as standard practice in large numbers of public and non-profit organisations. Bryson's definition of strategic planning for a not-for-profit organisation is:

Strategic Planning is a set of concepts, procedures, and tools designed to assist leaders and managers with these tasks. Indeed, Strategic Planning may be defined as ... a disciplined effort to produce fundamental decisions and actions that shape and guide what an organisation (or other entity) is,

what it does, and why it does it. (Bryson, 2004:6)

An embedded definition by Bryson and Alston (2004) can be seen by examining their ABC of Strategic Planning: ‘Strategic Planning is (A) figuring out where you are (B) figuring out where you want to go, and (C ) figuring out how to get there.’ While this may seem somewhat simplistic, the circular construction is a useful concept.

FIGURE 4.1

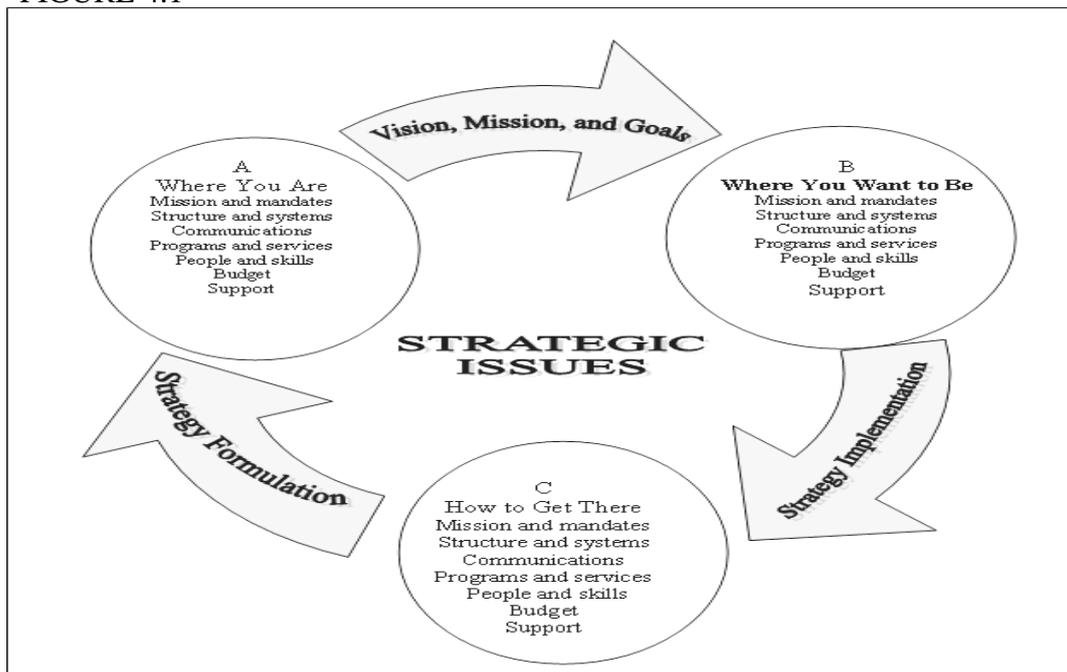


Figure 4.1: Bryson and Alston: ABC of strategic issues

(Source: Bryson and Alston, 2004)

Bryson (2004) indicates that leaders and managers come to understand A, B, and C as they formulate, clarify, and resolve strategic issues - the fundamental policy choices or challenges the organisation has to face.

The content of A and B are the organisation’s existing or new mission, structure and systems, communications, programs and services, people and skills, relationships, budgets, and other supports. The content of C is the

strategic plan; plans for various functions', ways to redesign, restructure, or re engineer; budget allocations; and other vehicles for change. Getting from A to C involves clarifying vision, mission, and goals. (Bryson, 2004:6)

Brian Fidler (2005) views strategic planning purely as a process, arguing that:

Strategic Planning refers to processes involved in formulating a strategic plan. This is a plan to operationalise strategy or put strategy into practice. It is the planning component of strategic management. Strategic management is the process of planning and implementing strategy. It involves strategic analysis, strategic choice and strategic implementation (Fidler, 2005 : 9 )

However, in addition to defining what strategic planning is, from different public and not-for-profit and educational perspectives, it is important to identify what strategic planning is not. This information will to a great extent clarify the notion and reduce the vagueness of strategic planning.

According to Drucker (1974), four broad concepts sum up what strategic planning is not:

1. Strategic Planning is not a bag of tricks, a bundle of techniques;
2. Strategic Planning is not forecasting;
3. Strategic Planning does not deal with future decisions. It deals with the futurity of present decisions;
4. Strategic Planning is not an attempt to eliminate risk.

(Drucker, 1974:123-125).

Keller (1983) also contributes a list, this time of ten things that strategic planning is not:

1. Strategic Planning is not the production blueprint.
2. Strategic Planning is not a set of platitudes.
3. Strategic Planning is not the personal vision of the president or the board of trustees.
4. Strategic Planning is not a collection of department plans compiled and edited.

5. Strategic decision-making is not done by planners.
6. Strategic Planning is not a substitute of numbers for intangibles.
7. Strategic Planning is not a form of surrender to market conditions and trends.
8. Strategic Planning is not something done at an annual retreat.
9. Strategic Planning is not a way of eliminating risks.
10. Strategic Planning is not an attempt to read the tea leaves and outwit the future.

(Keller, 1983:140-142).

Moreover, Bryson (2004) also identifies what strategic planning is not, in list form:

1. Strategic Planning is no panacea.
2. Strategic Planning is not a substitute for strategic thinking, acting and learning carried out by caring and committed people.
3. Strategic Planning is not a substitute for leadership.
4. Strategic Planning is not synonymous with creating an organisation strategy.

(Bryson, 2004:15-16)

These authors all agree that strategic planning is not the silver bullet and the best cure for every disease; nor is it substituting numbers for intangibles, guessing the future or predicting. They are clear that strategic planning is not a substitute for several things such as: strategic thinking, the input of caring and committed people, or leadership. Importantly for the topic of this research, Keller, in particular, stresses that strategic planning is not limited to the leaders of an organisation or the elites' personal vision.

### ***Similarities and differences between strategic planning and long-term planning***

It can be argued that although strategic planning is different from long-term planning on several points, they also have their similarities: for example, they both have their own form of schematic documents, and they both aim to plan for the future from 3-10 years.

Moreover, they both need organised efforts that cannot be underestimated, and require a considerable time to be accomplished.

Several strategic planning writers have discussed the differences between strategic planning and long-term planning. Keller (1983) argues that there are six features that distinguish strategic planning from other management disciplines and long-term planning:

1. Academic strategic decision-making means that a college, school, or university and its leaders are active rather than passive about their position in history.
2. Strategic planning looks outward and is focused on keeping the institution in step with the changing environment.
3. Academic strategy is competitive, recognising that higher education is subject to market conditions and to increasingly strong competition.
4. Strategic planning concentrates on decisions rather than documented plans, forecasts and goals.
5. Strategy making is a blend of rational and economic analysis, political manoeuvring, and psychological interplay. It is therefore participatory and highly tolerant of controversy.
6. Strategic planning concentrates on the fate of the institution above everything else.

(Keller, 1983:143-151).

Keller's discussion of strategic planning in education highlights the way that long-term planning concentrates on documented plans, forecasts and goals, whereas strategic planning focuses on decision-making. In the strategic planning process the leaders are active and creative, rather than predetermined and passive. Moreover, strategic planning looks on towards a dynamic future, while long-term planning assumes that future is unchangeable or at least that it is well predicted.

This difference is well expressed on the website Alliance Online, a resource for non-

profit organisations<sup>11</sup>:

.....The major difference between Strategic Planning and long term planning is in emphasis. Long range planning is generally considered to mean the development of a plan of action to accomplish a goal or set of goals over a period of several years. The major assumption in long range planning is that current knowledge about future conditions is sufficiently reliable to enable the development of these plans.’

The same source adds that, in contrast, the main idea in strategic planning for any organisation is that it must be sensitive to a dynamic, changing environment.

...the emphasis in Strategic Planning is on understanding how the environment is changing and will change, and in developing organisational decisions which are responsive to these changes<sup>12</sup>‘

On the same topic, the website of Compass Point, a company which supplies training to non-profit organisations, distinguishes between three forms of planning: firstly,

**Operational Planning**, which:

views the future as something that needs to be implemented now; focuses on setting short term (less than one year) objectives; assumes much more detailed planning regarding who and how activities will be accomplished; and asks: **‘What do we need to be doing for the upcoming year/immediately to best accomplish our mission?’**

While **Long Range Planning** looks at the future as:

predictable (assumes current trends will continue); focuses on setting long range objectives; assumes a most likely future and emphasises working backwards to map out a year-by-year sequence of events; and asks: **‘What should we be doing each year for the next 3-5 years?’**

But the strategic planning approach is different:

**Strategic Planning** views the future as unpredictable; views planning as a continuous process; expects new trends, surprises and changes; considers a range of possible futures and emphasises strategy development, based on

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<sup>11</sup> <http://www.allianceonline.org/content/index.php?pid=172>

<sup>12</sup> <http://www.allianceonline.org/content/index.php?pid=172>

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assessment of the organisation's internal strength and weaknesses and external (opportunities and threats) environment; and asks: (Based on our current understanding of environment), **Are we doing the right thing? How can we best use our resources to achieve our mission?**'<sup>13</sup>

The following table (Table 4.1) summarises the major differences between strategic planning and long-term planning.

TABLE 4.1

Elements	Strategic planning	Long term planning
System	Needs an open system so that the organisation can be dynamic and constantly changing as it integrates information from shifting environmental factors.	Needs a closed system so that the organisation can construct its blueprints for five or ten-years.
Supervision	A leader, facilitator, or consultant is needed to supervise the implementation of the Strategic Planning process.	A manager is needed to supervise the execution of the plan.
Concerns	Cares for all stakeholders and supporting figures inside and outside of the organisation.	Internal care about the organisation members only.
Purpose	Improves the organisation' current decision making, in order to achieve the vision and accomplish the mission statement.	Straight line of organised steps depends on present tendencies and the general trends, to make decisions about the future
Start points	the process, cases, projects, dispute points or the discussion points	Targets, goals and objectives
Emphasis	Emphasises creativity, innovativeness, and intuition, beside the art of planning, management, and decision making.	Emphasises the science of planning, management, and decision making
Rationality	Is rational because it incorporates the reality of the irrational.	Its application of formulas assumes rationality but is inadequate, as it gives too little attention to values, politics, and change circumstances.

**Table 4.1: differences between Strategic Planning and long term planning.**

<sup>13</sup> <http://www.compasspoint.org/askgenie/details.php?id=133>

### ***Benefits of the strategic planning process***

Most writers agreed that there were benefits from strategic planning. Cooper, (1985); Spikes, (1985); Brown and Marshall, (1987); Cawelti, (1987); Mecca and Adams, (1991); Valentine, (1991); Strategic Planning Roundtable, (1993); Cook; (1995); McCune, (1986); Romney, (1996); Bryson and Alston, (2004); Kaufman, (1996); Wincek and O'Malley, (1997) all demonstrated various benefits that were recognised through research studies. It is clear from the literature review and from the website search that more and more non-profit organisations are seeking to undertake strategic planning, because it aims to allow the organisations to focus and concentrate their abilities to arrange areas, goals, objectives and activities over a programmed time-line. Additionally, and perhaps more importantly, strategic planning enables the decision-makers of the organisations to plan actions that can lead and shape the organisation's future in response to a changing state of affairs.

Carter McNamara (1999)<sup>14</sup> in his article *Strategic Planning (in non-profit or for-profit organisations)* expresses the benefits in terms of the range of purposes strategic planning can fulfil:

Strategic Planning serves a variety of purposes in organisations, including to: clearly define the purpose of the organisation and to establish realistic goals and objectives consistent with that mission in a defined time frame within the organisation's capacity for implementation; communicate those goals and objectives to the organisation's constituents; develop a sense of ownership of the plan; ensure the most effective use is made of the organisation's resources by focusing the resources on the key priorities; provide a base from which progress can be measured and establish a mechanism for informed change when needed; bring together of everyone's best and most reasoned efforts, which have important value in

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<sup>14</sup> [http://managementhelp.org/plan\\_dec/str\\_plan/str\\_plan.htm#anchor4293674666](http://managementhelp.org/plan_dec/str_plan/str_plan.htm#anchor4293674666)

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building a consensus about where an organisation is going. It produces great satisfaction among planners around a common vision; increases productivity from increased efficiency and effectiveness; and solves major problems.

Bryson, (2004) describes strategic planning as a ‘smart practice’ that creates public value. He offers five important benefits for engaging in strategic planning in any organisation:

The first and perhaps most obvious potential benefit is the promotion of strategic thinking, acting, and learning, especially through dialogue and strategic conversation among key actors; The second benefit is improved decision making; The third benefit is enhanced organisational effectiveness; Fourth, Strategic Planning can produce enhanced organisational effectiveness of broader social system; Finally, Strategic Planning can directly benefit the people involved. (Bryson, 2004:11-13).

The Alliance Online Website describes the beneficial features of a successful strategic planning model, which ‘leads to action which builds a shared vision that is values-based.’ In addition, strategic planning ‘is an inclusive, participatory process in which board and staff take on a shared ownership.’ The same website adds that strategic planning ‘accepts accountability to the community.’ Besides, it ‘is externally focused and sensitive to the organisation’s environment.’ Moreover, strategic planning ‘is based on quality data.’ Furthermore, strategic planning ‘requires openness to questioning the status of existing or anticipated conditions of the system,’ especially if policies, system configurations, regulations, and management strategies remain unchanged. Finally, strategic planning ‘is a key part of effective management’<sup>15</sup>.

The website of Create the Future <sup>16</sup>, another training organisation for non-profit organisations, describes strategic planning as ‘a must in today’s fast changing

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<sup>15</sup> [www.allianceonline.org](http://www.allianceonline.org)

<sup>16</sup> [www.createthefuture.com](http://www.createthefuture.com)

environment’, again emphasising its advantages in dealing with change. This website lists benefits from strategic planning as: ‘determination of a clear sense of future direction and focus; improvements in programme and service delivery; enhanced marketing efforts; increased volunteering and membership involvement; and, more effective fundraising.’

Schools and universities may also achieve these benefits from implementing strategic planning, and they may find the answer for many of their organisational and administrative challenges. Developing a strategic plan for a school or university that covers a period of three to five years may benefit stakeholders in a variety of ways. A strategic plan establishes a vision, mission and beliefs for the school or the university; the plan establishes the track to accomplish its desired future; it provides a path which allows the community to work together to accomplish the goals, objectives, and activities that have been identified; it allows for an understanding of how a school or university works, how finances are spent, and identifies the needs of the school or the university; and allows the school or the university to set priorities driven by detailed and exact data.

### ***Limitations of strategic planning***

However, in spite of the benefits from strategic planning models that have been described by many authors, several sources point out that there are situations where strategic planning might be faced with different kinds of difficulties, might be misapplied or might not be implemented due to organisational barriers or limitations. Mintzberg (1994) explains the problems that both profit-making and non-profit organisations have with the change process, and refers to rigid bureaucracies and the

need for fluidity and flexibilities in thinking and carrying out the implementation of strategic planning.

In the literature review, three general organisational barriers or limitations were found that need to be overcome to successfully implement strategic planning. These barriers can be broadly categorised into the areas of *culture*, *resources*, and *execution*.

A conservative management culture in public and non-profit organisations in general, and in schools systems in particular, can resist change and consequently impede the efforts of strategic planning. (Schein, 1992) argues that since culture takes years to develop, it also takes years to change. He adds that if leaders ‘... do not become conscious of the cultures in which they are embedded, those cultures will manage them. Cultural understanding is desirable for all of us, but it is essential if they are to lead’ (Schein, 1992:23).

In order to implement change, the leader must understand what cultural forces to emphasise in the development, communication, and execution of the strategic plan, to overcome the natural and sometimes determined resistance to change. In addition to almost all schools having conservative cultures to change as described by Schein, other authors identify that there is a cultural barrier to successful strategic planning because there are two distinct cultures at any school: those who teach and those who do everything else. Newton, (1997) describes how these two groups of college professionals, because of their cultural differences in how they view their roles and responsibilities, cannot, or choose not to, communicate well with each other in order to move their institution forward. Newton’s description of the college environment could be duplicated to any public school.

Margaret Preedy, and Christine Wise (2003) in their book *Strategic Leadership and Educational Improvement* mention the importance of school culture in the change process. They call attention to a number of possible reasons for failure to implement strategic planning. In addition to:

... rejection of the values embodied in the change, or hard-rock resistance to all change, there are inadequate resources to support implementation, insufficient time elapsed, and the possibility that resisters have some good points to make. (Preedy and Wise, 2003:196)

Meinhart, (2006) categorises the resources of implementing Strategic Planning into three categories of time, trained people, and money; strategic planning needs the time of people such as faculty, department chairmen, or deans who serve on needed committees and produce and codify strategic planning in large organisations.

Keller (1983) argues that strategic planning needs a dedicated and trained planning staff to co-ordinate the efforts of others and help in implementing the action plan. In addition, strategic planning needs a cost accounting system and personnel to provide the proper level of financial fidelity. Meinhart (2004) mentions that Stralser (1997) points out the need of the cost accounting system because some tasks in the process may be viewed suspiciously by some faculty as not needed but viewed as very important by planners. Therefore, the resources aspect of implementing strategic planning also can be subject to cultural barriers. Schuster, Smith, Corak, and Yamada (1994) state that planning and governance can often be at odds with one another, because administrators (who value planning) and faculty (who value shared governance) have different cultural, political and economic experiences.

Rowley, Lujan, and Dolence (1997) in their book *Strategic Change in Colleges and Universities* present a whole host of implementation mistakes that may account for

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planning failure:

....no one pays attention to the plan; the planning process is too complicated; plans do not address real-world issues; and a lack of buy-in of the plan by major groups, such as faculty, external boards, and administration' (Rowley, Lujan and Dolence, 1997:34).

Meinhart (2004) refers to Ramsden (1998) who stated that no specific formula exists to preclude these mistakes from happening and some may be 'institution specific'; however, dedicated and inclusive leadership, with straightforward and open communications along with realistic expectations, goes a long way toward ensuring success.

McNamara (1999), in his article about strategic planning in non-profit organisations, gives an important list of elements that are to be addressed before making the commitment to strategic planning:

...a commitment of active and involved leadership, with continuous leadership engaged throughout the planning process; a resolution of major crises that may interfere with the long range thinking during, commitment to, and participation in the planning process (e.g., insufficient funds for the next payroll, the organisation is not operating legally, etc.); a board and staff that are not embroiled in extreme, destructive conflict; a board and staff who understand the purpose of planning and what it can and cannot accomplish, as well as consensus about expectations; a commitment of resources to adequately assess current programs and the ability to meet current and future client needs; a willingness to question the status quo and to look at new approaches to performing and evaluating the 'business' of the organisation.<sup>17</sup>

Most of the difficulties referred to by these authors seem to suggest that the organisations embarked on strategic planning before they were fully ready, and this may be particularly the case in educational organisations. As with any major effort, a

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<sup>17</sup> [http://www.managementhelp.org/plan\\_dec/str\\_plan/str\\_plan](http://www.managementhelp.org/plan_dec/str_plan/str_plan).

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strategic planning process has its appropriate time and place; there are certain school elements that must be in place in a school in order to ensure that the planning process will provide the maximum benefit to the school. It is important to be very clear when assessing the school's readiness to engage in a strategic planning process. It is also important to consider the school's culture and its diversity. The decision-makers should allocate the necessary resources such as time, human resources, and money to implement the strategic planning process. Finally, the strategic planning leaders must ensure the proper execution of the action plan.

### **Strategic planning models**

Having examined a variety of definitions and descriptions of what strategic planning is and what it is not, as well as the benefits and challenges of strategic planning, this review will now consider some of the existing models or processes that have been advocated for public, non-profit, higher education and school organisations to implement the processes of strategic planning.

The literature offers a number of strategic planning models, including goals-based, issues-based, organic, and scenario-based. **Goals-based strategic planning** is perhaps the most common, and starts with concentrating on the organisation's vision and mission and/or values, which lead to goals to work toward the mission, strategies to achieve the goals, and action plans. **Issues-based strategic planning** usually starts by investigating issues facing the organisation, followed by strategies to address those issues, and action plans. **Organic strategic planning** might start by creating the organisation's vision and values, and then formulate action plans to achieve the vision while holding to the values.

Some plans are targeted to a few months or one year, many to three years, and some strategic plans are aimed at five to ten years into the future. Several plans include the most important information, such as vision, mission statement, and values, but no action plans. Other plans take five to ten pages to state the general goals and objectives of the organisation, while others can take considerably longer to give detailed explanations of the action plans. A number of models will now be discussed in this part of the literature review, in order to view how strategic planning models have improved and progressed, and with a view to arriving at a suitable model to be implemented in the Saudi Arabian context for this research study.

### **The SWOT model**

Most texts on strategic planning mention SWOT analyses in one way or another. While in the military context, SWOT means Strategies, Weapons, Objectives, and Targets, SWOT in every profit or non-profit organisation means *Strengths; Weaknesses; Opportunities; and Threats*. The SWOT analysis technique was devised by the American management consultant Albert Humphrey in the 1960s. Mintzberg (1994) mentions that since the Harvard Business Model in 1962, there have been hundreds of strategic planning models adapted from the original SWOT model, which he prefers to call ‘the Designed School Model’. The model depends on creating strategies through conducting an internal analysis of the organisation, looking at strengths and weaknesses, and an external appraisal to look at threats and opportunities. Basically, this historic model consists of four steps as follows: SWOT analysis; creation of strategy; evaluation and choice of strategy; and implementation of strategy.

It can be noticed from this model that there is no vision or mission statement for the

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organisation. Also, the evaluation stage is purely for the choice of strategy. The organisation's values are to be considered in the second and third stages, during creating, evaluating, and making choices of strategies. This model was widely used, with some modifications, throughout the 1960s and 1970s.

### **The Igor Ansoff model**

There is a quite detailed explanation of the Ansoff Model in Mintzberg's book *The Rise and Fall of Strategic Planning* (1994). Mintzberg clarifies that the strategy in this model is designed to transform a firm from the present position to the position described by the objectives, subject to the constraints of the capabilities and the potential of the organisation. He adds that 'two concepts are central to its understanding'. The first is **Gap Analysis**, which is designed to evaluate the 'difference [gap] between the current position of the firm and the objectives.' (Mintzberg,1994:44). The organisation chooses the strategies that will significantly close the gap.

The second concept is **Synergy**, which refers to the idea that firms must seek 'product-market posture with a combined performance that is greater than the sum of its parts,' more commonly known as the "2+2=5" formula. Ansoff explains the formula as 'any effect which can produce a combined return on the firm's resources greater than the sum of its parts.' (Mintzberg,1994:45)

### **The Paine and Anderson model**

Paine and Anderson (1983), in their linear model, suggest eight steps for the strategic planning process:

Assess environments, opportunities and threats; generate mission; identify organisation's strengths and weaknesses; establish policies; specify objectives; generate strategies and/or strategic choices and identify

alternative strategies; evaluate strategies; and implement plans. (Paine and Anderson, 1983:35-36).

Once more, this model does not mention the organisation's vision. The mission statement is to be generated in the second stage. There is no request for evaluation at each step. It depends only on analysing the external and internal environment of the organisation, which provide the guide to formulating the strategies.

### **The Johnson and Scholes model**

An important model of strategic planning is the Johnson and Scholes model (1993). In this adaptive model, the authors argue that strategic management processes are often incorporated in three distinct stages, as follows:

Strategic analysis: the environment, culture and stakeholder expectations, resources and strategic capability.

Strategic choice: Identifying strategic options, evaluating options, and selecting strategy.

Strategic Planning implementation: Managing strategic change, planning and allocating resources and organisation structure and design. (Johnson and Scholes (1993:23)

Johnson and Scholes explain that the three stages are not in a linear form, in that strategic analysis must precede strategic choice, which in turn precedes strategic implementation. Practically, it is very likely that the stages are interlinked in an ongoing process.

Additionally, it can be noticed from the illustration of this model in Figure 4.2 below that the purpose of the organisation (vision) and the mission statement are not stated in the actual model, although the culture is mentioned. However, these aspects are expected to be considered at the stage of strategic choice.

FIGURE 4.2

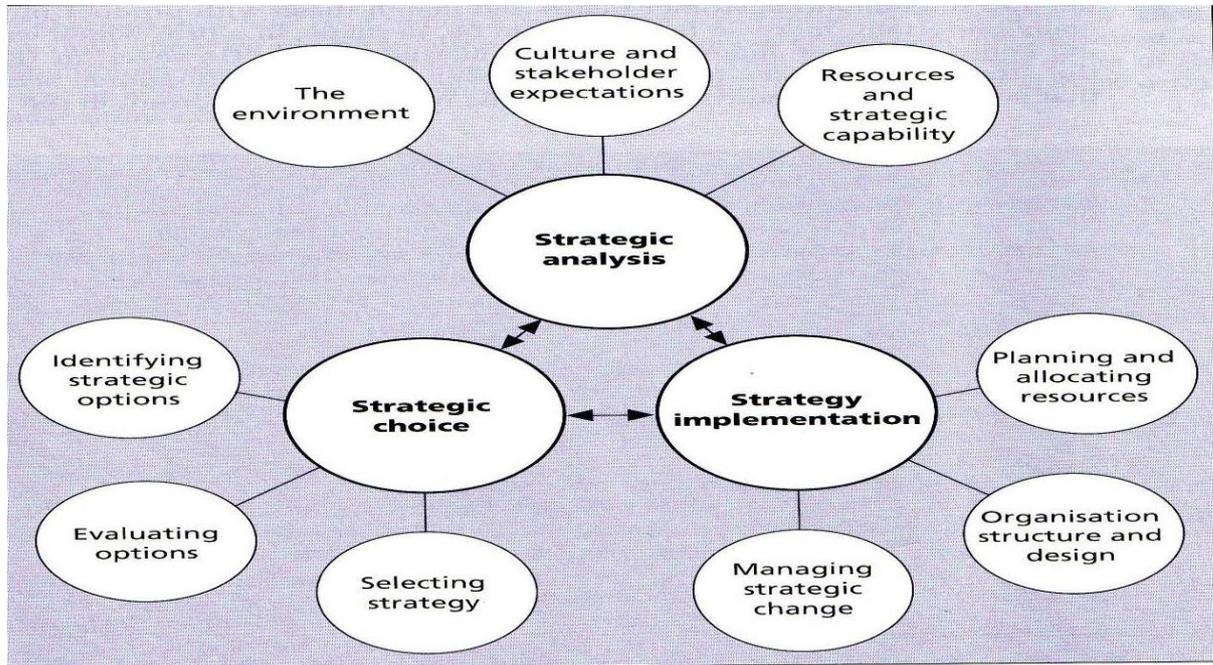


Figure 4.2: The Johnson and Scholes model of strategic planning

(Source: Johnson & Scholes, 1993)

### The Dolence and Rowley and Lujan model

A ten-step strategic planning model, using many of the previously mentioned concepts, was developed by educators Dolence and Norris (1995) and further elaborated by Dolence, Rowley and Lujan (1997) in their examination of strategic planning from conceptual and practical perspectives. Keller amplified this work's strength in his Foreword to their book, *Strategic Change in Colleges and Universities*, when he describes the model as '... a major contribution to the continuing struggles to find an acceptable process to strategic, foresighted improvements in higher education...' (in Rowley, Lujan, and Dolence, 1997: x).

This ten-step process advocated by Rowley et al. (1997) is as follows:

1. Develop key performance indicators (KPIs).
2. Perform external environmental assessment.
3. Perform internal environmental assessment.
4. Perform a strengths, weaknesses, opportunities and threats (SWOT) analysis.
5. Conduct brainstorming.
6. Evaluate the potential impact of each idea on each SWOT (cross-impact analysis).
7. Formulate strategies, mission, goals and objectives.
8. Conduct cross-impact analysis to determine the impact of the proposed strategies, goals and objectives on the ability to meet the key performance indicators (KPIs).
9. Finalise and implement the strategies, goals and objectives.
10. Monitor and evaluate the actual impact of strategies, goals and objectives on the key performance indicators (KPIs).

(Rowley, Lujan, and Dolence, 1997: 102-103)

### **The Bryson model**

Bryson (2004) broadly identifies another ten-step process for strategic planning, as follows:

1. Initiate and agree on a Strategic Planning process.
2. Identify organisation mandates.
3. Clarify organisation mission and values.
4. Assess the external and internal environments to identify strengths, weaknesses, opportunities, and threats.
5. Identify the strategic issues facing the organisation.
6. Formulate strategies to manage these issues.
7. Review and adopt the strategic plan or plans.
8. Establish an effective organisational vision.

9. Develop an effective implementation process.
  10. Reassess the strategies and the strategic planning process.
- (Bryson, 2004:32-34).

There are many similarities in these two models, especially when they refer to the understanding of the environment and actions needed. However, an important part in the Bryson model, which is not present in the Rowley, Lujan, and Dolence model, is the identification of vision. This is a main difference, for developing a vision can be an important aspect of creating a lasting strategy and ensuring buy-in. As discussed above, Cawelti (1987) and Pfeiffer, Goodstein and Nolan (1989) consider it a key element of strategic planning.

However, Bryson's inclusion of vision late in the planning process (step 8) reflects that he still allocates low importance to developing a vision: in fact, he considers this to be an optional step -- the only optional step of the ten (Bryson, 2004). Dolence, Rowley, and Lujan (1997) also identify that a vision will be demanded of higher education leaders, but do not go so far as to include it in their ten steps.

## **Summary**

As has been noted in the previous chapter, in the context of Saudi Arabian education, the concept of vision is important. The Saudi system is based on defined aims for the future of the country and the central position of the Islamic faith in the country's culture. The idea of shared values and ideals has a much more pivotal role than in many other organisations, or even education systems, elsewhere.

With this in mind, the present author devised the Makhdoom Strategic Planning Model (MSPM), which is a vision-led model and which will be implemented and tested in

Saudi Arabian schools during this research study. The MSPM builds upon the models proposed in the literature, but consciously moves a step further away from the business-led origins of earlier models; it is a more values-focused model which the author feels is appropriate to Saudi schools and indeed schools elsewhere.

### **The Makhdoom Strategic Planning Model**

The author's suggested Strategic Planning Model for use in schools has been the product of earlier research and development (Makhdoom, 2001 and 2002) and was implemented in the sample schools in Saudi Arabia during the study which will form the later chapters of this thesis. Problems raised both leading up to and during its implementation are examined in order to answer the research questions.

As can be seen from Figure 4.3 below, this is a **ten-step, ongoing, circular** and **vision-led** model. The steps and some circularity are seen in earlier models, but the author proposes that the vision-led aspect is unique to this model. Each stage will be discussed in turn, with reference to the literature as well as an explanation of its practical application.

#### ***The preparation phase***

Before conducting the strategic planning process, a school needs to go through the preparation phase. This is an essential introduction to the ten steps of the Planning Model itself.

Stakeholders need to be informed about the process and asked for their involvement. For this research project within the Saudi system, each school needed to prepare to obtain approval from the school district or the educational general director in the city; to

choose whether to get help from a trained strategic planning facilitator or not; to set up the school Strategic Planning Team; to schedule meetings and arrange agendas; and to set the time for beginning the strategic planning process.

Since the concept of strategic planning is not well-known in Saudi Arabia, some education was required: schools needed to organise workshops to prepare and train the school Strategic Planning Team and most of the school stakeholders so that they could become familiar with important strategic planning skills and terms such as strategic thinking, creating vision and mission statement, SWOT analysis, smart objectives, and evaluation. The school Strategic Planning Team needed to be chosen to represent all the stakeholder groups, for example, the head teacher, deputies, teachers from each subject area, parents, educational authorities, local figures, and student representatives.

Before implementing the MSPM, head teachers have to prepare the school environment and all the stakeholders to be knowledgeable about the school strategic planning process. The head teacher is recommended to contact all the key authority personnel in his or her educational district, all students' parents, some of the influential people in the neighbourhood, and all school employees. It is proper also to involve some of the well-known people in the educational fields, as well as some affluent figures to support the school when needed. After using the appropriate communications to contact all stakeholders, head teachers should work to get the authorities' official approval for strategic planning to be started in the school.

The school can then begin to work through the ten steps of the MSPM.

FIGURE 4.3

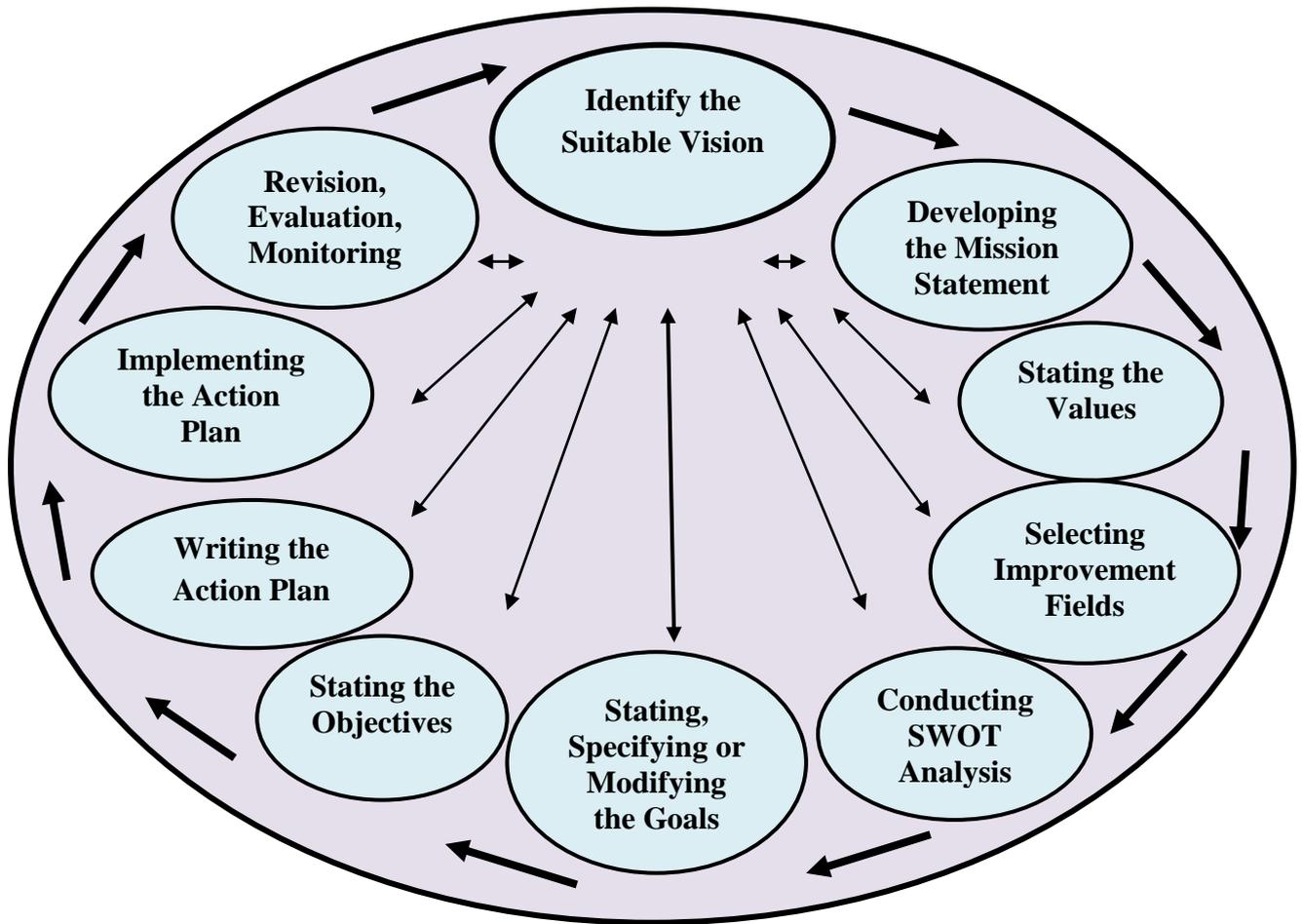
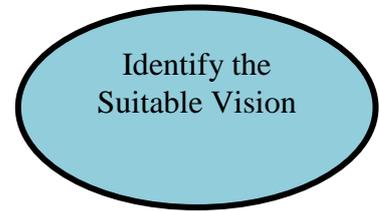


Figure 4.3: The Makhdoom Strategic Planning Model (MSPM)

Source: Makhdoom (2002) – revised 2006

***Step 1: Identifying a suitable vision for the school***

Unlike the models previously discussed, the Makhdoom model places **vision** in a position of considerable importance, indeed, when this strategic planning model is first implemented, vision is the starting point.



In order to proceed with this step, we need to know what vision is, who makes the vision and how the school vision can be created with the Strategic Planning Team at the school. Also, it is very important to distinguish between *vision* and *mission statement*. The literature review revealed that several websites, companies and schools used the two terms interchangeably, most likely because of lack of knowledge or misunderstanding.

Richard Kock (2000) mentions that ‘the word vision is often used as a synonym for mission statement, particularly in non English speaking countries, where mission is difficult to translate. But the two concepts are different’. He explained further by stating that:

Vision is a view of what the firm could become, imagining a desired future, an inspiring view of what a company could become, vision may be thought of as a future goal, a dream about its future shape and success or a picture of a potential future for a firm. (...) Vision is the long term aspiration of a leader for his or her firm, that can be described to colleagues and that will urge them on through the desert... the best vision evolves from experience during the first five years of a transformation process (Richard Kock, 2000:272-273).

Bush and Coleman (2003) in their book *Leadership and Strategic Management in*

*Education* argue that: ‘Defining a clear vision for the organisation is an important stage in this process. The concept of vision has become increasingly important in the management of education’. They describe vision as:

an explicit sense of direction and purpose. ... Vision refers to the desirable future state of the organisation. It relates to the intended purpose of the school or college, expressed in terms of values and clarifying the direction to be taken by the institution. It should be inspirational so that organisational members are motivated to work towards it with pride and enthusiasm. It is closely identified with school improvement (Bush and Coleman, 2003: 10).

The same reference clarifies that The Teacher Training Agency (TTA) in England and Wales noticed the significance of vision and put it as one of the National Professional Qualifications for Headship (NPQH) stating that ‘Heads are expected to provide vision and to embody that vision in their leadership of schools, to inspire pupils, staff, governors, and parents’. It is clear, therefore, that vision is notably popular and important for schools nowadays. Moreover, a school’s vision should include a mental image of a possible and desired future state of the students, school, preferred changes and society in general.

In practical terms, the statement of a successful school vision should be as short as possible (not more than ten words), easy to memorise and inspiring; it should describe the desired student and school status in the future and should be made in the school by the school’s key stakeholders. Furthermore, the vision must not disagree with the educational philosophy and aims of the country.

It is recommended in the MSPM that the head teacher and Strategic Planning Team, with the assistance of a facilitator, try to create and develop the school shared vision inside the school in brainstorming meetings in the following steps:

1. Form two or three groups from the Team; explain what vision is, what is its purpose, and other vision specifications;
2. Request three visions or more from each group;
3. Examine each suggested vision against the ideal vision description;
4. Select key words from all the suggested visions given and discussed; for example you will find related words that have nearly the same meaning in the recommended visions, such as students, learners, generation, women, youngsters, daughters, son, children, man, men, grown-ups, or adults.
5. Choose the most convincing and preferred word to use as a key word in the suggested vision. It might be changed by the team afterwards.
6. Reach agreement on each word and its meaning;
7. Reselect the most preferred word for each meaning or key word selected;
8. Put all the preferred key words together and try to make a good sentence and connect these words together to create the suggested vision;
9. Make sure there is satisfaction and complete agreement about the vision's meaning;
10. Disseminate the suggested vision to every stakeholder. Try to communicate with them and be open to any participation;
11. Broadcast the final draft to gain support, approval and commitment.

## ***Step 2: Developing the school's mission statement***

Once the Strategic Planning Team has succeeded in creating and developing the school vision, the team will be ready to go to the next step, which is developing the school **mission statement**. Again, we need to know: what is a mission statement? And what are the differences between a vision and a mission statement?

In defining the mission statement, Bryson (2004) argues that ‘mission clarifies an organisation’s purpose, or why it should be doing what it does; vision clarifies what it should look like and how it should behave as it fulfils its mission’ (Bryson, 2004: 102)

Marylyn B. Schwartz (2001) asserts that:

Mission statement flows directly from the vision statement. It is the implementation of the vision and it outlines what must happen to realise the vision. It’s a “how-we-will-get-there” guide that contains action words and adjectives that modify them. (...) A good mission statement: will do/contain/is the following: elicits an emotional, motivational response; is easily understood and can be transferred into individual action; has a measurable, attainable goal; is three to four sentences long; Is simple, honest and frank; and is fully believed<sup>18</sup>

Fidler (1996) talks about the ‘focus statement’ of a school and describes it as a:

concise, compact, meaningful statement outlining the specific purpose of a school. It should be capable of being “unpacked” to yield the core values of a school and its vision of the future. The most basic feature of the statement is that it should be a guide to action... the mission statement embodies the values and mandates and stipulates the long-term purpose to be pursued whilst providing social justification for an organisation’s existence. The focus statement is the school’s strategy or major development for the next few years. The focus statement must not be a blanket promise to do everything (Fidler, 1996: 225)

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<sup>18</sup> : [http://realitytimes.com/rtpages/20010130\\_statements.htm](http://realitytimes.com/rtpages/20010130_statements.htm)

According to Bush and Coleman (2003), a mission statement expresses the purpose of an organisation, provides a guide to action for members of the organisation and explains its overall aims and philosophy. It is ‘usually regarded as a more specific expression of the values of the institution; a vehicle for translating the inspiration into reality’ (Bush and Coleman, 2003:12).

At this stage the Strategic Planning Team may still show some confusion between vision and mission statement; Table 4.2 below illustrates the differences.

Element	Vision	Mission statement
Time relating	Describes the future image of the organisation and what the organisation wants to become.	Describes the present and what an organisation is all about.
Length	One short attractive sentence, not more than ten words and easy to memorise	Not more than one page, to translate and explain the vision.
Emotional response	To inspire, motivate and attract attention.	Realistic, practical and believable
Contents	Enlighten us why we are doing what we are doing. Possible and desired future state of the students, school, preferred changes and society in general.	Practical: What are we doing? Why are we doing it? How are we going to do it? How are we going to respond to the authorities, clients, and all stakeholders? What are our values? What distinguishes us from other institutions?

**Table 4.2: differences between a vision and a mission statement**

As with the vision, the Makhdoom model places considerable emphasis on reaching the maximum agreement and consensus on the mission statement. It is best if the Strategic

Planning Team retains the same members for both these stages. The model recommends that the head teacher and Strategic Planning Team, with the assistance of a facilitator, try to create and develop the school shared mission statement inside the school during brainstorming meetings in the following steps:

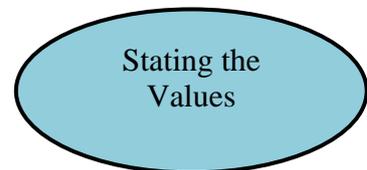
1. Explain what the mission statement is, what is its purpose, give the mission statement specifications, and clarify what are the similarities and differences between vision and mission statement.
2. Request a suggested mission statement or more from each group to be presented before beginning the next session. It is advisable to give the team as much time as necessary outside of the meeting to explain the vision and to answer questions about the mission statement specifications, because otherwise it will consume a great amount of time inside the brainstorming gathering.
3. Examine each suggested mission statement against the ideal mission statement descriptions and specifications;
4. Select key words or key sentences from all the suggested mission statements given and discussed;
5. Choose the most convincing and preferred words and sentences as key words in the suggested mission statement. These can be changed by the Team later on if required.
6. Reselect the most preferred word or sentence in every part of the mission statement for each meaning or key word selected;
7. Reach agreement on the meaning of each word and sentence in the

- mission statement, so that everyone understands it in the same way;
8. Put all the preferred key sentences together and try to connect these words to make a good paragraph and to create the suggested mission statement;
  9. Make sure there is satisfaction and complete agreement about the meaning of the mission statement;
  10. Disseminate the suggested mission statement to every stakeholder and try to communicate with them and be open to any participation;
  11. Broadcast the final draft to gain support, approval and commitment

### ***Step 3: Stating the school's values.***

The literature review revealed that defining the organisational values is accepted as a very important step in any strategic planning process.

**Values** are a set of guiding principles by which an organisation operates; they are also used for developing relationships with the stakeholders; furthermore, values often drive the policies, aims, goals, actions, and directions for the organisation. Some institutions prefer to put a special paragraph or page to demonstrate the organisation's professional values and they may name it 'Value Statement', while others choose to illustrate it clearly within the mission statement.



Fidler (1996) argues, based on (Schein1992) and others, that in establishing values it is very important 'to take account of the culture of the organisation. These are the shared,

taken-for-granted assumptions made by group members...it is the way we do things around here...in other words, this is the accepted way to operate successfully' (Fidler, 1996: 99). Rieley (2006) connects the organisational behaviour and success with its values when he argues that:

Behaviours are tied inextricably to organisational values. An organisation that lacks clarity in its collectively perceived values will see behaviours that not are congruent with the ability of the organisation to satisfy and, therefore, attain its vision for the future. However, clarity in organisation values leads to an increased ability of a population to demonstrate behaviours that are congruent with, and supportive of, what an organisation does, and where it is going. The bottom line is that understanding organisational success is not all about 'what' an organisation does, but 'how' it does it. The 'how' it does it is a behaviour issue. (Rieley,2006:124).

The MSPM recommends that values should be defined and agreed upon in the school during brainstorming meetings with the Strategic Planning Team, in steps similar to the process for the school vision and mission statement.

The Strategic Planning team should be asked to:

1. Write down ten to fifteen professional educational values that are very important, very clear, easy to understand, and related to the school culture.
2. Provide all the suggested values to everyone in the team
3. Discuss every value against its meaning, its importance, its rate and priority. See if you can combine similar values in general ones.
4. Sum up the values to about ten values and ensure satisfaction and complete agreement about every value's meaning.

5. Disseminate the suggested values to every stakeholder. Try to communicate with them and be open to any participation.
6. Broadcast the final draft to gain support, approval and commitment.

After this, take another good look at the vision and the mission statement. Some words or sentences could be modified or improved in the light of the most recent discussions.

#### ***Step 4: Selecting the improvement fields***

When they decide to develop a strategic plan, school Strategic Planning Teams have different **improvement areas** to look at. Inside the school, there are elements such as: students; teachers; school leadership; cleaning and custodians; maintenance; educational resources; school buildings; curriculum, study courses, and programmes; curriculum-related activities; school canteen; finance and income; and other elements that depend on each school situation. In the other hand, there are fields outside the school that any planner should not forget such as: the Ministry of Education and the General Educational Department; the educational supervision centre; students' parents; the local community and neighbourhood; government administrative centres; school transportation services and may be some additional areas according to their circumstances.



The MSPM recommends that these fields should be defined carefully, because they will be very important in analysing the school situation from inside and outside. A clear definition of each field will concentrate the thoughts during the brainstorming sessions, save time, and provide satisfying results. Furthermore, this process could offer ideas of

priority to the team when they examine the range of school needs. Two charts showing the areas of potential improvement “inside the school” and “outside the school” should be posted at an appropriate location and observed by every person in the Strategic Planning Team during the strategic planning process.

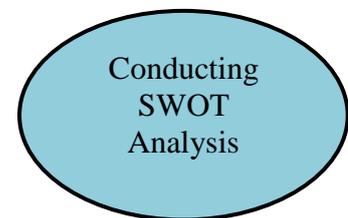
Teams should also take another look at the vision, the mission statement and the values. Some words or sentences could perhaps be modified or improved.

### ***Step 5: Conducting a SWOT analysis.***

In conducting the SWOT analysis, **strengths** and **weaknesses** should be looked at as internal factors, while **opportunities** and **threats** are external factors. Brian Fidler (1996) in his book *Strategic Management for School Improvement* defines these:

Opportunities are those facets in the environment that are going to enhance the strategy of the organisation and ensure both its long term survival and its success. On the other hand threats are those aspects of the environment which will make the progress of the organisation more difficult and, in worst possible case, could pose threats to its survival. (Fidler, 1996:94)

Jim Knight (1998) calls SWOT ‘the strategic positioning review of the school;’ he points out that it ‘reviews the current state of the school within its external and internal contexts. The consideration of the external contexts inevitably includes a view of possible changes which may occur in the future’ (Knight, 1998: 18).



Brian Fidler (2005), in the more recent edition of *Strategic Management for School Development*, recommends that the analysis is used to face up to difficulties; he states that:

SWOT analysis recognises that a combination of an external opportunity and an internal strength represents a growth point, whilst an external weakness needs to be reduced. The possibilities offered by other two positions are less clear. Where opportunities coincide with internal weaknesses, it may be worthwhile to seek to deal with the weaknesses or ignore the opportunity. Where there are external threats to internal strength it may be worthwhile to seek to deflect the threats or allow the internal strength to decline (Fidler, 2005: 15-16)

It can be argued that analysing the existent position of a school will be very helpful in the school improvement process. However, the school Strategic Planning Team should understand and think carefully how to judge each factor, in order to determine which factors are strengths and which factors are weaknesses. Similarly, there will probably be misunderstanding between opportunities and strengths. Without good training in strategic planning, almost all the members of the Team are likely to look at opportunities and strengths as positive points for the school without any differentiation, while weaknesses and threats are in most people's judgement negative positions against the school progress and may be classified into the same category. Weaknesses and threats have obvious differences in SWOT analyses and should be classified or categorised independently.

The MSPM considers strengths, weaknesses, opportunities and threats in relation to the school vision, mission statement and values established in the previous steps. These elements must be clearly defined and understood first, because they will be the criteria that judge whether a factor is a strength or why it is a weaknesses. Strength, weaknesses, opportunities, and threats should not be judged according to people's preconceptions. Even if strengths and opportunities are considered positive positions for the school toward accomplishing the school vision, they have very clear and straightforward distinction. The strengths are positive facts, excellent positions, high-

quality conditions, or good situations that take place in the reality of the school, whilst opportunities are positive facts, excellent positions, high-quality conditions, good situations or chances that could be captured and brought to the school in the future and utilised to be helpful in achieving the school vision. Similarly, it is a fact that both weaknesses and threats are negative positions or unconstructive situations. Nevertheless, weaknesses what in the present reality is actually experienced at the school, whereas threats are what is expected to happen and might be harmful in the future and stand in the way of achieving the school vision.

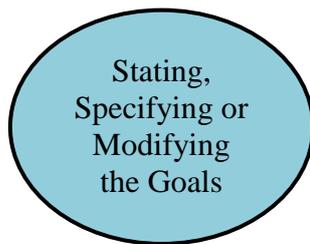
Based on these distinctions and the definitions of strengths, weaknesses, opportunities and threats, the MSPM recommends that the Strategic Planning Team in the school should respond to eight important questions for the duration of the SWOT brainstorming sessions. These questions are:

1. What are the strength factors inside the school building?
2. What are the strength factors outside the school building?
3. What are the weakness factors inside the school building?;
4. What are the weakness factors outside the school building?
5. Are there any opportunities inside the school building? What are they?
6. Are there any opportunities outside the school building? What are they?
7. Are there any threats inside the school building? What are they? and
8. Are there any threats outside the school building? What are they?

These eight questions will help to analyse the school internally and externally. For example, the reality of an excellent and qualified science teacher in the school is a

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strength inside the school, and hosting them voluntarily to give an educational lecture or workshop for the other teachers or the parents in the school is an opportunity from inside the school. Similarly, the fact that there are several educated, co-operative, and wealthy parents is a strength outside the school, while asking them to support the school's extra activities is an opportunity from outside the school. The reality of an existing broken glass window in the classroom is an internal weaknesses, whilst the fact that the educational district has a very poor maintenance department or they need long paperwork and bureaucratic procedures in order to come and fix this danger is an external weakness. In the same way, uncovered electric cables in the classroom are an internal threat and could cause the death of a student, whereas, the possibility of not



renewing the rental contract of the school building for the next year is an external threat and could cause the closure or removal of the school. Therefore, the Strategic Planning Team should prepare these eight lists carefully and ask for input from other stakeholders. The final eight lists should be revealed to everybody for an appropriate time for revision and reconsideration. These actions will be very helpful in conducting the next step. However, before that we should think and focus on answering these questions: how can we enforce all the strengths? how can we overcome each weakness? how can we take advantage of each opportunity? and how can we prevent each threat?

### ***Step 6: Stating, specifying, or modifying the school's general goals***

Goals, Aims, Objectives, and Targets are administrative terms that can be easily

misunderstood and are often used interchangeably. David Pardey (2006) in his book *Introducing Leadership* gives useful definitions for goals, aims, objectives, and targets, although he actually classes aims, objectives, and targets as different categories of goal.

The **aim**, in his definition, is:

...very broad and general, not all that specific; set for the longer term and likely to change only very gradually over time; as the goal shifts slightly one way or another, in the term we used earlier, aims are the general direction being headed for. The **objectives** are specific and focused on achievement in the medium term, with performance measured and the objectives reviewed periodically, to check that they still correct and achievable. The **targets** are very specific, shorter-term goals that contribute to the achievement of objectives, but they are unlikely to be changed unless something happened to prevent them being achieved or to make them no longer relevant' (Pardey, 2006: 132).

Pardey's idea about these terms is that targets are steps towards objectives which move towards aims. The further away they are, the less specific the goals and the longer the timescale over which they should be set. In this research Pardey's definition and goals classifications will be used for the four terms. Therefore, in the suggested Model, we are working from the general to the particular: there is the vision at the top and then the goals will be in this order: aims followed by objectives and finally the more short-term targets.

Stating, specifying, or modifying the school's general goals is the sixth step in the suggested model. The model recommends that the Strategic Planning Team should use the eight lists and the final four questions from the SWOT analyses to develop general goals, beside the Ministry of Education's goals for each educational stage. The Strategic Planning Team should build up aims to enforce and expand each internal and external strength factor to achieve the school vision; they should develop aims as well to overcome and defeat each weakness factor in the lists, beside making aims to exploit

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and take advantage of every opportunity factor; and finally develop aims to prevent and keep away from all the threat factors.

As soon as they have drawn up their own list of goals, together with the former list from the Ministry of Education, and the goals from the Educational District, they need to meet and state these goals in a priority list, from the very urgent and most important to the least important. These aims should be general, qualitative (if possible) and could



serve more than one factor in the lists. For example, they could make an aim that reinforces several strengths but in the same time prevent other threats or overcomes weaknesses.

Similarly, they may modify an aim that takes advantage of opportunities in order to defeat several weaknesses.

### ***Step 7: Stating the school's objectives.***

Many books, articles, and websites see the **objectives** as quantified, specific, measured, and focused on achievement in a medium time period. However the term objective is often connected to the word SMART, an acronym which describes the different elements that are useful in objectives: SMART stands for Specific; Measurable; Achievable; Realistic; and Time-framed. The MSPM advises that when we write an objective and try to make it *specific*, we should ask these questions:

1. Who is involved?
2. What do we need to accomplish?
3. Where do we want to do it (location)?

4. When it should happen (time frame)?
5. Which requirements or constraints should be put in order?
6. Why are we trying to accomplish this objective (Reasons, purposes, or benefits)?

When we need to consider how far the objectives are *measurable*, we could ask how much? how many? or how will we know when the objective is accomplished? To consider if they are *attainable*, we should think of attitudes, abilities, skills, products knowledge, services knowledge, and financial capacity. For the *realistic* aspect, we should enquire this: have we accomplished something similar in the past? What conditions need to exist to accomplish this objective? Does everyone in the team understand the objective clearly? And are they capable of assisting us to achieve it? For the *time-framed* aspect, it is advisable to start a countdown calendar or lists to be done in the timescale, making safety margins for each objective in order to know where we are now? And what is left to be accomplished?

### ***Step 8: Writing the school action plan.***

Writing the school **action plan** is a very important stage in the Strategic Planning process. It is expected to consume a significant amount of time, (and it should).

Al Habeeb (1995) argues that ‘an action plan (also referred to as an “operational plan”)



Writing the  
Action Plan

is a written summary of what you are going to achieve in your organisation for a particular period of time, regularly not more than a year’ (Al Habeeb, 1995: 37).

The Joint Commission Organisation describes an action plan as ‘the product of the root cause analysis which identifies the strategies that an organisation intends to implement to reduce the risk of similar events occurring in the future. The plan should address responsibility for implementation, oversight, pilot testing as appropriate, time lines, and strategies for measuring the effectiveness of the actions’<sup>19</sup>.

Another definition from the College of Redwoods of the action plan: ‘a tactic or set of tactics that address a specific college goal. The plan should address responsibility for implementation, oversight, pilot testing as appropriate, time lines, and strategies for measuring the effectiveness of the actions’<sup>20</sup>.

The MSPM recommends that, after establishing all the objectives and writing them down according to the SMART system, the Strategic Planning Team should classify them into several categories or fields and organise them in priority order. Each field will contain several objectives that will lead to achieve the aims that help to achieve the school mission and vision.

An action plan table should be made, containing several elements such as the aim, the objectives, field of improvement, actions to be taken and procedures, the executors( by whom?) , time of execution (when?), the expected cost (how much?), and types of monitoring, revisions and evaluation procedures in order to make sure of achieving the objectives. Some action plan tables may eliminate or add a few columns according to the school situation or needs. Some schools might previously have an old version of an action plan table and like to use it; the most important thing is the content of the table.

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<sup>19</sup> [http://www.jointcommission.org/SentinelEvents/se\\_glossary.htm](http://www.jointcommission.org/SentinelEvents/se_glossary.htm)

<sup>20</sup> <http://inside.redwoods.edu/StrategicPlanning/defenitionofterms.asp>

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Moreover, the action plan should be made by the people who are going to implement it and carry out the actions listed in it.

Following is an example of an action plan chart (Figure 4.4) that illustrates the basic columns needed to write an action plan. Nevertheless, an objective may be accomplished by more than one action or procedure; hence, the Strategic Planning Team should think about and write every possible action that will lead to achieving the objective, with all the information needed to simplify the monitoring and evaluation process.

<i>No.</i>	<i>Objectives</i>	<i>Field of improvement</i>	<i>Actions and procedures</i>	<i>Executors</i>	<i>Time of execution</i>	<i>Expected cost</i>	<i>Types of monitoring and evaluation</i>
1	To continue support and encourage the distinguished performance of the teachers at least twice a year	Teachers	Cash Rewards, appreciation certificates, or discount	The head teacher and the deputies	The end of each term	500	Obtaining the support and appreciation for every exceptional teacher
2							

**Figure 4.4: Action plan chart**

### ***Step 9: Implementing the action plan.***

Several requirements were mentioned through the literature review in **implementing** the action plans, such as: awareness, motivation, commitment, and the ability of the participants to achieve the objectives.

Implementing  
the Action  
Plan

It can be argued that the human factor can break or make any Strategic Planning process. Getting the support and co-operation of key stakeholders at different levels inside and outside the school is a significant issue for successful action plan implementation.

Al Habeeb (1995) points out that ‘achieving the goals while implementing the action plan usually requires the awareness of people towards the goals, commitment of the participants to achieve the goals, and the capability of implementing the actions and procedures’ (Al Habeeb, 1995: 46) .

The MSPM recommends the following steps to implement the action plan:

1. Produce a channel to communicate targeted information for key stakeholders about the school vision, mission statement, values, and general goals.
2. Increase understanding among the stakeholders in order to build support at all levels of the school about the strategic planning goals.
3. Create proficiency through training, access to information, and transfer of successful practices, procedures, technologies, teaching methodologies, and student evaluations, to expand the capacity of the school staff.
4. Motivate and create incentives that encourage staff to improve strategic planning implementation to achieve the goals.
5. Monitor and track all the actions, using the monitoring and evaluation elements developed as part of the action plan to monitor, revise, and evaluate progress on a regular basis.

The following charts can be utilised to put in order and co-ordinate the implementation of the action plan. The first (Figure 4.5) is for categorising the tasks to achieve all the goals and objectives in one classified field. This table contains the field, goals and objectives, description of tasks, names of the people involved, action and procedures needed to be taken, time limit and scale, and any notes or comments during or after accomplishing the tasks. One of the school Team should be assigned to co-ordinate and to be in charge of implementing the goals of each field of improvement.

FIGURE 4.5

Tasks and assignments for the field:				
Goals and objectives to be achieved:				
Description of the tasks :				
No	The executors	Actions and procedures	The time	Comments
1				
2				
3				

**Figure 4.5: Chart of field tasks and assignments**

The next chart (Figure 4.6) is used to co-ordinate the tasks of each teacher or participant in the action plan. It contains the name of the school member, goals and objectives to be achieved, actions and procedures to be taken, time-scale, and any notes or comments to be addressed throughout the implementation process. This chart or record should be handed out to every member of the school Strategic Planning Team, explaining his or her part in the action plan, and describing his or her task that lead to achieving the specific objectives that he or she is involved in. The complete copy of the action plan

should be accessible to all the Strategic Planning Team whenever it is needed, so that they can look at the entire picture and help in putting together the different efforts into one track which leads towards accomplishing the school vision.

FIGURE 4.6

Participant's Record			
Mr. :		Stage:	Term:
Goals and objectives to be achieved :			
No.	Actions and expected procedures	Time	Comments
1			
2			
3			

Figure 4.6: Chart for participant.

Revision,  
Evaluation,  
Monitoring

### *Step 10: Revision, evaluation, and monitoring.*

Each objective in the action plan should lead to one or more aim, which helped to accomplish the school mission statement in order to achieve the school vision. Therefore, every action should be **revised, tracked, monitored, and evaluated** carefully before, during, and after the process.

The World Health Organisation describes the evaluation process as:

the means by which a judgment can be made about the value or worth of something. It is the method of assessing what has been achieved (the outcome) and how it has been achieved (the process). It requires looking

critically at the intervention, assessing both its merits and shortcomings, and identifying how it could be improved in order to make it more efficient and effective. Recommendations on what changes could be made to improve the project are made as a result of an evaluation. If project workers implement the changes, then the evaluation can be considered to have had a large impact on the project. Conversely, if only minor changes are made, then the evaluation can be seen to have had little impact'.<sup>21</sup>

FIGURE 4.7

Record of monitoring and evaluation of a field				
Field/programme title:				
Field/programme co-ordinator:				
Purpose of the monitoring and evaluation:				
NN o.	Actions to be monitored and evaluated	Method of data collection	Responsible person	Frequency/ Time frame
1				
2				
3				

**Figure 4.7: Monitoring and evaluation of a field**

We should ask ourselves several very important questions prior to carrying out this step of the Strategic Planning model. These questions are:

1. Did we achieve our objectives?
2. Did we document everything about actions and procedures?
3. How could this be improved in the future?
4. Was the project flexible enough?

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<sup>21</sup> <http://www.wpro.who>

5. Did we change anything if needed?
6. Was the funding realistic?
7. Was the plan working?
8. Was the process evaluation data used as a guide?
9. Should more of the stakeholders be involved next time?
10. Who was missing?
11. Did the strategic planning team have the right skills?
12. Did the evaluation show that we could improve the outcomes in any way?

In monitoring the action plan and in documenting any problems or changes to the action plan, we will be able to write up our implementation evaluation report and state: whether we followed the original action plan or not; what was learnt in the process; what has been achieved; what difference the action plan made; how the action plan's outcomes can be distributed to the stakeholders or other schools; and what still needs to be done in each improvement field. The chart in Figure 4.7 above can be used to track every action in the action plan and to simplify the final evaluation report.

It is true that this Strategic Planning model consists of ten steps and this is the final step; however, it is an ongoing process.

### ***Circularity and wider applications of the Model***

One of the strengths of the Makhdoom Strategic Planning Model is that it is a circular process. It differs from most other models which are essentially linear; even those

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which have some circularity in their illustration are seen in terms of one journey towards an ultimate goal. The illustration of the Model in Figure 4.3 shows the circular concept; the principle is that reaching the tenth step should be followed by a re-consideration of the school vision, mission statement, school values, and school general goals and objectives and by setting new improvement fields for the future, and so following the process round again. Thus, the school is constantly in touch with its vision and regularly renewing its efforts to improve. Even though the school strategic plan may be three to five years long, it is recommended that the Strategic Planning Team should meet and talk about the school strengths, weaknesses, opportunities, and threats each school year, so as to be continually preparing for the next journey round the process.

Although the focus of this research is on the implementation of this model in the school context, and in Saudi Arabian schools in particular, the author believes that the MSPM could be beneficially implemented in almost any organisation. The model is simple and easily followed through its ten steps, although some back-up training is required for personnel who are unused to the language of strategic planning. It is especially suited to organisations that have an aspect of public service, for example in fields such as education, healthcare or charitable work, where the author believes that the focus on vision as the beginning and end of the planning process is both appropriate and helpful.

The next stages of this research will examine the process of implementing the MSPM in the sample schools and will observe the model in action and the problems that may arise. First, it will be necessary to outline the research methodology employed for this study.

## Chapter Five - Research Design and Methodology

### Introduction

The three previous chapters were about introducing the background to the study: the education system in Saudi Arabia, the Ministry of Education's educational Ten Year Plan and the literature review concerning the strategic planning concept in general and in the field of education. This chapter is focused on research design and methodology.

School strategic planning belongs to both the fields of social science and education. In both these fields there are two main approaches which are most frequently used for research studies: the quantitative approach and the qualitative approach. The principal method for this research study will be a qualitative approach, in order to address the research question: *What are the problems involved in the implementation of a suggested strategic planning model (the MSPM) for schools in Saudi Arabia?* In addition to identifying the problems, the study also aims to reveal any benefits which the schools perceived from introducing the MSPM, in order to give a balanced picture of the experience as reported by the schools.

### Choice of Methodology

According to Yin (2003) the choice of research methodology relies generally on three conditions: 'the type of research questions; the control an investigator has over actual behavioural events; and the focus on contemporary as opposed to historical phenomena.' (Yin, 2003: 1)

Selecting the right design should avoid employing methods that might be favoured but would be entirely inappropriate. In this regard, Silverman (2005) stressed that there is no method that is always appropriate to every research problem, advising that, 'you need to think through exactly what you are trying to achieve rather than be guided by some fashion or trivial preference' (Silverman, 2005: 7). Strauss and Corbin in their book *Basics of Qualitative Research* (1998) defined qualitative research as 'any type of research that produces findings not arrived at by statistical procedures or other means of quantification. It can refer to research about persons' lives, lived experiences, behaviors, emotions, and feelings as well as about organisational functioning, social movements, cultural phenomena, and interactions between nations.' (Strauss and Corbin, 1998: 11)

Bernard (2001) described the phenomenology used in qualitative research and its emphases on direct observation of specific phenomena, when he stated that 'unlike positivists, phenomenologists seek to sense reality and to describe it in words, rather than numbers, words that reflect consciousness and perception. Phenomenology is part of the humanistic tradition that emphasises the common experience of the feeling of others' (Bernard, 2001: 20). Silverman (2005) explains that 'qualitative research seems to promise that we will avoid or downplay statistical techniques and the mechanics of kinds of quantitative methods used in, say, survey research or epidemiology' (Silverman, 2005: 6). Qualitative research, therefore, is collecting, analysing, and interpreting data by observing what people do and say. Qualitative research refers to the meanings, concepts, definitions, characteristics, metaphors, symbols, and descriptions of things. Qualitative research is much more subjective than quantitative research and uses very different methods of collecting information, mainly individual, in-depth interviews and focus groups. The nature of this type of research is exploratory and open-ended. Small numbers

of people are interviewed in-depth and/or a relatively small number of focus groups are conducted.

Strauss and Corbin (1998); Bernard (2001); and Silverman (2005) agree that in qualitative research participants are asked to respond to general questions and the interviewer or group moderator investigates and explores their responses in order to identify and define people's perceptions, opinions and feelings about the topic or idea being discussed and to determine the degree of agreement that exists in the group. The quality of the finding from qualitative research is directly dependent upon the skills, experience and sensitivity of the interviewer or group moderator.

The qualitative approach was chosen for this study, as the research objective centres on the problems which people working in education may encounter when they adopt the MSPM. The research is not aiming to establish objective facts about the sample schools, but rather to capture the personal experiences and changing perceptions of the school staff regarding the implementation of the model. The interviews with senior management personnel also aim to reveal attitudes and preconceptions of those working in important roles in a centralised system. Thus, this is a study of people's responses to a proposed change in their working methods. This research uses a combination of interviews, with both management and school staff, to establish these responses, and case studies of the sample schools, to observe the progress of the MSPM implementation on a practical level. However, the case study observations are also informed by the participants' accounts and are therefore qualitative in nature.

## **Interviews**

The interview is probably the most widely employed method in qualitative research. It is

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the flexibility of the interview that makes it so attractive. Gall et al. (2003) argue that:

The major advantage of interviews is their adaptability. Skilled interviewers can follow up a respondent's answers to obtain more information and clarify vague statements. They also can build trust and rapport with respondents, thus making it possible to obtain information that the individual probably would not reveal by any other data-collection method (Gall et al., 2003: 222).

Robson (2000) also agrees that 'the interview is a kind of conversation' (Robson, 2000: 228). However, Kvale (1996) defines qualitative research interviews as 'attempts to understand the world from the subjects' point of view, to unfold the meaning of peoples' experiences, to uncover their lived world prior to scientific explanations' (Kvale, 1996:43).

Cohen and Manion (1989) described the interview conversation as 'one initiated by the interviewer for the specific purpose of obtaining research-relevant information and focused by him on content specified by research explanation' (Cohen and Manion, 1989:307).

The open-ended answers in qualitative research evaluation provide the evaluator with quotations that are the main source of raw data. Patton (1987) notes that quotations tell the interviewees' levels of feeling, the way in which they think about what is happening, their experiences, and their basic perceptions. In addition, the mission of the qualitative researcher is to offer a framework within which people can reply in a way that represents precisely and thoroughly their opinions about the subject being investigated.

### ***Constructing the interviews***

The literature offers many examples of useful advice on constructing interviews. Kahn and Best (1993) advise that: 'interview data can easily be biased and misleading if the person being interviewed is aware of the perspective of the interviewer. Too often, interviewees provide information based upon what they think the interviewer wants to hear. Therefore, it is critical for the interviewer to make sure that the person being interviewed understands

that the researcher does not hold any preconceived notions regarding the outcomes of the study' (Kahn, and Best, 1993: 199).

An expert interviewer should avoid various kinds of questions that develop misunderstanding or undermine the interview's validity. Hoinville and Jowell (1977) list four kinds of questions that should be avoided: long questions, because the interviewees might remember part of the question and respond to that part; double-barrelled questions, because it might be better to separate them into several questions; leading questions, because that will have an effect on the questions' reliability and the interview outcomes; biased questions, whether in the way of writing the questions or in the manner of asking or receiving the questions.

Oppenheim (1992) indicates that the interviewer may influence the interviewees by means of facial expression, intonation, by pausing at certain points, by using leading questions or various other signals. In the same way, Pervin (1989) notes that 'the interviewer can influence the responses of the subject in a variety of subtle ways. The appearance and the manner of the interviewer will have different meaning for different subjects, and the impact on the data may vary accordingly' (Pervin, 1989: 43).

Interviews can be in different forms; therefore a decision should be made to choose which is suitable for the study. The three major forms of interviews are: structured interviews; semi-structured interviews, and unstructured interviews. Gall et al. (2003), Robson (2002), and Wragg (1994) explain in detail the main types of interviews:

**The structured interview** involves a series of closed questions that may be answered yes-no, or by selecting short-answer choices. The respondents' answers are not followed up to get greater depth, and thus are similar to those obtained from a questionnaire. This type of

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interview gives little space for new insights; respondents are not free to give the answers or information which they think very important, and the researcher may miss a whole area of concern, just because he did not think to ask questions about it.

**The unstructured interview** does not involve a detailed interview guide. As an alternative, the interviewer asks questions that can lead the respondent to give the desired information. Usually the type of information required is difficult for the respondent to express or is psychologically sensitive. For this reason, the interviewer must adapt continuously to the respondent's state of mind. This format is very subjective and time-consuming.

**The semi-structured interview** involves asking a series of structured questions and then searching for deeper answers using open-ended questions to get additional information. In this type of interview the researcher begins with the same question; however he might ask different probing questions based on the respondent's answers. This interview approach has the advantage of providing reasonably standard data across respondents, but of greater depth than can be obtained from a structured interview.

The author considered that structured interviews would not provide the in-depth account of personal experience that was needed for the research; on the other hand, totally unstructured interviews were unlikely to produce responses which could usefully be compared between the various interviewees. It was decided that the semi-structured approach would be the most productive form of interview to adopt for this study.

### ***Group interviewing***

Glesne and Peshkin (1992) suggest that interviewing more than one person at a time sometimes proves very useful, and some topics are better discussed by a small group of

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people who know each other. Smith suggested that group interviewing should be ‘...limited to those situations where the assembled group is small enough to permit genuine discussion among all its members’ (Smith, 1954:59 cited in Stewart and Shamdasani, 1990:10).

In view of the fact that qualitative researches focus on words and observations to express reality and try to illustrate people in normal circumstances, the key element here is the involvement of people where their disclosures are encouraged in a nurturing environment. It recognises the human trends where feelings, thoughts and perceptions are developed through interaction with other people. During a group discussion, individuals may shift their views due to the influence of other comments. Alternatively, opinions may be held with certainty. Kreuger (1988) suggests that ‘the purpose is to obtain information of a qualitative nature from a predetermined and limited number of people’ (Kreuger, 1988:26).

In this study, it was necessary for practical reasons to carry out interviews in group situations. However, the author did not feel this to be a restriction, as the members of the groups were colleagues who were used to each other’s personalities and views. The possibility for discussion in response to the questions was useful in revealing the experiences of participants.

### ***Qualitative Interview Analysis***

The information collected from the individual interviews or group discussions is raw data. The researcher’s task is to prepare a statement regarding the collected data. The first step is to transcribe the entire interview. This will provide a complete record of the discussion and will facilitate analysis of the data. The next step is to analyse the content of the discussion. The aim of this analysis is to look for trends, concepts, categories, or patterns that reappear

within either a single interview, group interviews or among various interviews. Kreuger (1988) suggests that ‘content analysis begins with a comparison of the words used in the answer. Also, the researcher must consider the emphasis or intensity of the respondents’ comments. Other considerations relate to the consistency of comments and the specificity of responses in follow up probes’ (Kreuger, 1988:109).

Transcription prepares the material from the interviews for analysis, and produces a large volume of material which must be condensed, categorised or otherwise interpreted and made meaningful, and this may turn out to be one of the most costly and time-consuming aspects of the study.

The most suitable techniques for analysing any research data will depend on the research aim, the nature of the data collected, as well as the resources available for this stage of the study. Some techniques appear to be more objective, while others depend more deeply on the subjective conclusions and insights of the researcher. Computer software programs are available that can assist in categorising interview statements or counting key words, which may allow some forms of quantitative analysis. Patton (1987) suggests a number of techniques for quantifying and analysing qualitative interview data. Kvale (1996) also describes five analysis methods: meaning condensation; meaning categorisation; narrative structuring; meaning interpretation; and generating meaning through ad hoc methods.

## **Case study**

Having decided to implement the MSPM in twelve sample schools for this research, the author needed to define the method by which these schools would be studied. Given that this was a relatively small sample and the research was qualitative in nature, a case study approach was chosen, taking each school as a case.

Case studies are defined in various ways; indeed, there is an agreement among several authors and researchers that a standard case study does not exist. However, Yin (2003), Stake (1995) and others who have wide experience in this methodology have developed extensive procedures, and when these procedures are followed, the researcher will be following methods as well developed and tested as any in the scientific field.

Benbasat, (1985), Kaplan and Duchon (1988), Yin, (2003) and Stake, (1995) agree that: a case study examines a phenomenon in its natural setting, using multiple methods of data collection to gather data from one or several units (individuals, groups or organisations). The boundaries of the phenomenon might not be clearly obvious at the beginning of the research, and no experimental control or manipulation is used. The case study approach is particularly appropriate for individual researchers because it gives an opportunity for one aspect of a problem to be studied in some depth.

Yin (2003) has identified some specific types of case studies: *exploratory* - when the researcher needs to discover and examine a phenomenon, and sometimes the cases are considered as an introduction to social research; *explanatory* - when the cases are studied to give explanation about a phenomenon and may be used for doing causal investigations; and *descriptive* - when the cases require a descriptive theory to be developed before starting the project. Stake (1995) and Silverman (2005) include three others: *intrinsic* - when the researcher has an interest in the case; *instrumental* - when the case is used to understand more than what is obvious to the observer; *collective* - when a group of cases is studied.

Case study research is not sampling research; that is a fact asserted by all the major researchers in the field, including Yin, Stake, and others. However, cases must be selected

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to maximise what can be learned in the period of time available for the study. The case study is considered by Benbasat (1985) to be a possible method in three settings:

It is necessary to study the phenomenon in its natural setting; the researcher can ask “how” and “why” questions, so as to understand the nature and complexity of the processes taking place; research is being conducted in an area where few, if any, previous studies have been undertaken (Benbasat, 1985: 370).

Yin (2003) presents at least four applications for a case study model: to explain complex causal links in real-life interventions; to describe the real-life context in which the intervention has occurred; to describe the intervention itself; to explore those situations in which the intervention being evaluated has no clear set of outcomes.

The analysis stage in the case study method is a critical factor. Case studies tend to be selective, focusing on one or two issues that are fundamental to understanding the system being examined. It is normally a system of action, rather than an individual or group of individuals: such as, in this study, the action of introducing the MSPM. Bell (1993) suggests that analysis can be carried out through interviews or group discussions of a number of cases from which conclusions can be drawn within a limited time-scale, which is the method the author has followed in this research.

Case studies are multi-perspective analyses: the researcher considers not just the voices and perspectives of the participants, but also those of the relevant groups of participants and the interaction between them (Feagin et al., 1991). Yin (2003) encourages researchers to make every effort to produce an analysis of the highest quality. In order to accomplish this, he presents four principles that should attract the researcher’s attention: show that the analysis relies on all the relevant evidence; include all major rival interpretations in the analysis; address the most significant aspect of the case study; and use the researcher’s

prior, expert knowledge to further the analysis.

Case study is a valuable method of research, with distinctive characteristics that make it ideal for many types of investigations. It can also be used in combination with other methods. It was therefore chosen by this researcher as part of the investigation into the consequences of implementing the MSPM in the sample of Saudi Arabian schools.

## **Representative sample**

As previously explained in Chapters Two and Three, the educational system in Saudi Arabia is very much a centralised system, as all state schools in Saudi Arabia are governed by the Ministry of Education. The private schools are also under the Ministry of Education's management in terms of educational supervision, curriculum, major activities, testing and evaluation. Almost all schools are ruled by the Saudi Arabian educational policy, and have the same regulations, orders, procedures, and responsibilities. Schools could be in the middle of the city or in the villages; government schools or private schools; boys' schools or girls' schools, they all have the Stage General Objectives to accomplish and fulfil for each stage of education. Planning for school day-to-day activities is left under the supervision of the Educational Districts and is for the school head teachers to organise and implement.

Therefore, selecting a representative sample of schools was relatively easy, the main differences between schools being type of location. A secondary school from a city should resemble any other city secondary school, while schools in villages will have their own shared characteristics. For this reason, and for reasons of convenience, schools in the Holy City of Makkah and the surrounding area were selected for this study. A total of twelve schools were selected: four elementary, four middle, and four secondary. The elementary

schools were all of average size<sup>22</sup>; one situated inside the city, one in a village, one private elementary school in Makkah, and one girls' elementary school inside the city. Similarly, four intermediate or middle schools of average size were chosen as representative of intermediate schools in Saudi Arabia: one inside the city, one in a village, one private intermediate school in Makkah, and one girls' intermediate school inside the city. Finally, four secondary or high schools were chosen as a representative sample of secondary schools, all of average size: one inside the city, one in a village, one private high school in Makkah, and one girls' secondary school inside the city.

## **Research Design**

The research study, therefore, proceeded through the following stages:

1. Select the sample schools for case study
2. Obtain necessary permissions
3. Prepare questionnaires and other research plans
4. Conduct interviews with senior management and stakeholders in the Saudi education system
5. Conduct preliminary interviews within the sample schools
6. Conduct workshops to prepare the schools for working with the MSPM and setting up Strategic Planning Teams
7. Schools implement the Strategic Planning Model
8. Conduct further interviews within the sample schools

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<sup>22</sup> Details about the schools are given in the next chapter.

9. Analyse results
10. Draw conclusions and consider recommendations

## **Data collection and preparation**

Since the main method for this research study was a qualitative approach, the twelve schools would each tell their story of implementing the MSPM in schools in Saudi Arabia. These stories were abbreviated and summarised into case studies by collecting data from group interviews, initial interviews, workshops and training sessions in which the author was personally involved, notes that had been taken through observations while implementing the MSPM, and final interviews.

The school data were collected through three phases. The first phase was collecting documentary information about the schools selected from Makkah Educational District and the schools database, as well as conducting the individual initial interviews with the schools' head teachers and the school Strategic Planning Teams, in addition to preliminary group interviews with the school district management in the Holy Capital. The second phase was accumulating data throughout the observation that took place during the implementation of the suggested school Strategic Planning Model in each school. Finally, the third phase of data collection was from the final interviews with the same participants who were involved in the initial interviews and the school Strategic Planning Teams.

Interviews were also conducted with senior managers in the education system regarding their views on strategic planning at school level.

The interviews were conducted using semi-structured questions. The questions were initially written in English, revised by an academic with a PhD in education, and were

approved by the research supervisor. Then the questions were translated into the Arabic Language by a PhD Arabic academic who has recently graduated from the University of Hull (UK). The questions were used and tested in the pilot study, and slightly modified to be utilised in the other interviews. All the interviews were carried out in the Arabic language and recorded by digital recorder and transcribed in Arabic afterwards by the researcher.

### ***The initial interview questions***

The initial interviews were intended to find out attitudes towards strategic planning and how much the participants knew about it, as well as the existing planning arrangements in the schools. Some questions were factual, but others asked about opinions or experience. The following questions were used in semi-structured interviews in the initial meetings with the schools' senior teachers and staff.

Q1. What kind of planning, if any, does your school operate: Short-term? (Day or week); Middle-term? (Term or year); Long-term? (Three to five years)

Q2. Have you any experience of strategic planning?

If the answer was 'yes', then the following questions were used to continue the interview:

Q3. What does school strategic planning mean to you?

Q4. From your point of view, what are the benefits of school strategic planning?

Q5. What are the limitations of school strategic planning?

Q6. What are the barriers to implementing strategic planning: in general and at your school?

Q7. Do you think that strategic planning for any school is a necessity or a luxury?

Q8. Do you think that every school needs its own strategic plan; and why?

Q9. From your point of view or your experience; why is strategic planning not adopted in Saudi Arabian schools?

Q10. If you were offered a workshop in school strategic planning, would you attend the session?

However, if the answer to question number two was 'no', then the following questions were asked.

Q3. In your opinion, what do you think strategic planning is?

Q4. Do you think that you need to know more about strategic planning; and to what extent?

Q5. Do you think that you need to implement strategic planning in your school for the purposes of better performance?

Q6. Do you think that every school needs its own strategic plan and why?

Q7. Do you think that strategic planning for any school is a necessity or a luxury?

Q8. From your point of view or your experience; why is strategic planning not adopted in Saudi Arabian schools?

Q9. What are the barriers to implementing strategic planning: in general and at your school?

Q10. If you were offered a workshop in school strategic planning, would you attend the session?

### ***Workshops and training sessions***

The workshops and training sessions were video recorded using an assistant, and reviewed later for note-taking by the researcher.

### ***The final interview questions***

The following questions were asked after the MSPM workshop had been held and the MSPM had been implemented in the schools.

The participants mostly were the same Strategic Planning Teams that conducted the initial meeting and were interviewed previously. The participants now had direct experience on which to base their answers. The following questions were used for the semi-structured interviews (some are alternative versions which were used depending on how the interview progressed):

Q1. In your opinion what is the appropriate way to do this process? Must the Ministry begin its strategic planning process, then it moves to the departments, then to the educational centre and finally to schools; or should the opposite be happening ?

Q2. How was the reception of the public to your new vision?

Q3. Did they have any questions, opinions or comments on the subject or planning in general?

Q4. Was it difficult to apply the MSPM?

Q5. What do you think are the advantages of implementing school strategic planning?

What are the significances of school strategic planning?

Q6. What are the benefits of the MSPM now that it has been implemented and what do you expect to happen at the school?

Q7. What were the problems or the obstacles you expected in implementing the MSPM?

Q8. If you remember the ten steps of the MSPM, do they have problems or defects?

Q9. Are there any other impediments to the implementation of the MSPM?

Q10. Is the training long enough?

Q11. Do any of the steps of the MSPM need any more clarification or explanations?

Q12. What has the school vision in the MSPM provided you with, and what are its effects?

Q13. As for the students, how did the vision in the MSPM change or improve them; have the students become interested in this subject?

Q14. Do you agree that strategic planning reduces uncertainty and risks in doing school activities?

Q15. What has the MSPM done to the school in respect of obligation and co-operation of the teachers?

Q16. How did you use the vision to improve the school?

Q17. What are the problems or obstacles you faced when implementing the MSPM?

Q18. What is the role of the school's administration in the success of implementing the MSPM process in the school?

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Q19. What are the problems expected to occur when implementing strategic planning?

Q20. Do you expect any problems from the students or their guardians in the implementation of the MSPM?

Q23. Would obtaining permission from the Educational District to conduct school strategic planning be considered an obstacle in implementing strategic planning at school?

Q24. Do any of the steps of the MSPM need further explanation or clarification?

Q25. Do you agree that strategic planning decreases the doubts and dangers in the performance of the work at school?

Q26. Do you think that strategic planning contributes in the benefit of the opportunities that could exist in the framework of the school?

Q27. To what extent does the MSPM contribute in uniting efforts at the school to work together in the surrounding environment?

The translated interview results and notes that been taken during the workshops throughout implementing the suggested school Strategic Planning Model were utilised for coding and further data analysis using N Vivo software.

For the purposes of this thesis, it was necessary to translate the transcripts of all the interviews and meetings from Arabic to English. Two PhD Arabic academics were involved, one from Egypt and the other one from Iraq, then the English transcripts were reviewed by the researcher and finally checked and corrected by the research supervisor.

## **Ethical Considerations**

### ***Confidentiality and cultural expectations***

No pupils of the schools participated, so only adults were involved. All interviewees were treated in a strictly ethical manner. They were aware that at any time they could withdraw from the interview and were under no obligation to participate. Their permission was asked for interviews to be tape recorded for research purposes. They were asked to give their consent to their names being used in the final thesis, which all gave; however, on further consideration, the author has used the data analysis codes to refer to the participants, in order to protect their confidentiality, and the schools have also been given numbers rather than using their actual names.

At the girls' schools, the procedures had to be somewhat elaborate in order to observe the cultural norms of Saudi society. Video and audio technology were used to facilitate the interviews, and the researcher was pleased to be able to arrange the interviews in a way that was not felt to be intrusive or disrespectful.

### ***Researcher's position***

As the creator of the MSPM, the researcher clearly has an interest in its success and the possibilities of bias have been borne in mind throughout the research study. The choice of a research title, objectives and research questions which explicitly search for the disadvantages and obstacles to the model will, it is hoped, convey the author's serious aim to test the model in as objective a way as possible and to reveal clearly any weak points or negative aspects it may have.

## Chapter Six - Findings and Analysis

### *Introduction*

This chapter presents and analyses the data from the interviews conducted with the higher management personnel and from the case studies of the twelve sample schools. More than thirty-five interviewees were involved in the study; eight of the interviewees were from the higher management personnel in the Educational District. Eight head teachers participated in this study, as well as nine deputy head teachers, three student activities leaders, three student' guidance teachers, and seven teachers.

There were two initial group interview sessions, one with some of the higher management personnel and the other with Middle School No.1 Strategic Planning Team. There were six final group interviews, with the Strategic Planning Teams from Elementary School No. 1, Middle School No. 1, Secondary School No. 1, the combined schools No. 2, the combined schools No. 3 (private, boys), and the combined schools No.4 (private, girls).

In introducing the higher management interviews analysis, the chapter will talk about part of the administrative hierarchy of Makkah General Educational District, in order to explain the roles of the higher management personnel who were interviewed in the study.

The twelve schools will each be introduced with some basic facts: number of classes; number of teachers; number of students; number of administration staff; school location; building type; number of laboratories; and type of playground. Additionally, several

questions will be answered in order to place the school in context and establish its situation regarding planning: Is it a combined school with other stages? Is it a governmental or private school? Does the school have a strategic plan? Does the school have a vision? Does the school have a mission statement? What kind of plan does the school have? Is it a head teacher's plan? Is it a school plan? And is the school part of any educational experimental programme? Each case study will discuss these ideas in addition to the notes that were taken before, during, and after the school interviews and the observations throughout the workshop sessions.

### **Interviews with higher management personnel**

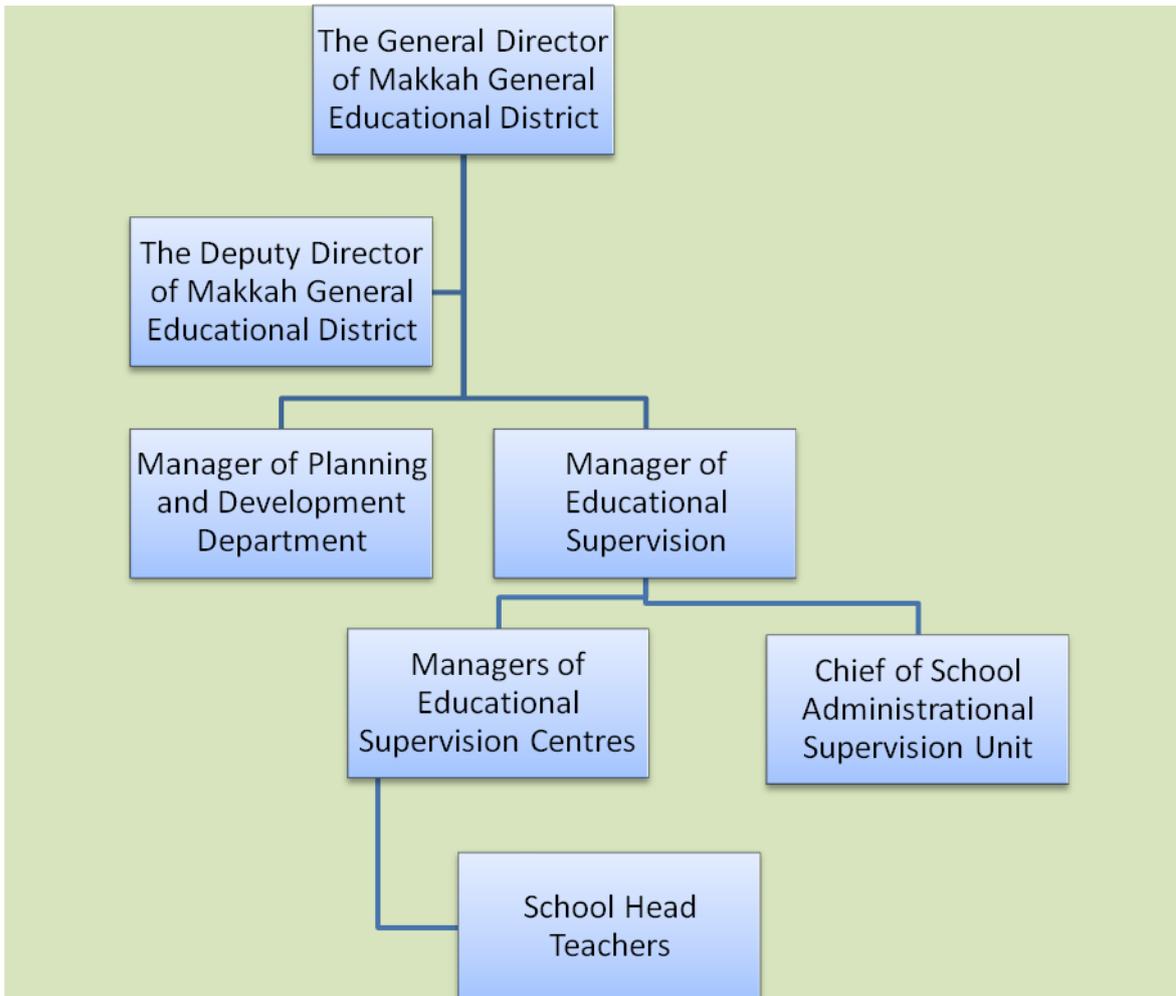
When the author arrived in Makkah the Holy Capital, he had a great and warm welcome from the General Director of Makkah General Educational District, who gave him an open invitation to any school in Makkah to conduct his study, asking him to co-ordinate with the Manager of Planning and Development Department in this matter.

The Manager of Planning and Development Department was very happy about the study, clarifying his dissatisfaction with the current school planning methods. He suggested a group meeting with the higher management personnel in the Educational District to discuss school strategic planning issues. Since it was very difficult for them to gather in the same time and the same place, the meeting was held with three of them only, and the rest of the higher management interviews were conducted individually.

Figure 6.1 below shows part of the Administrative Hierarchy of Makkah General Educational District. It shows the individual higher management personnel who were interviewed in the this part of the study, and at the lower end of the hierarchy, the Head

Teachers, who were interviewed at their schools for the case studies.

FIGURE 6.1



**Figure 6.1: The interviewed higher management personnel**

The selected directors or managers are directly connected with the educational administrative affairs of Makkah Educational District. By and large, these administrative personnel are connected to and concerned with the planning process in

general, and the school strategic planning in particular.

These directors or managers were not in the same buildings or the same locations, and they had different schedules. Several meetings were held to achieve the goals of these interviews, according to their schedules and the appointments that the researcher could manage to get from them.

### ***Interview analysis***

The first meeting was a group interview with the Deputy Director of Makkah General Educational District, the Manager of Planning and Development Department, and the Chief of School Administrational Supervision Unit; the second meeting was with the Manager of Southern Educational Supervision Centre in Makkah; the third interview was with the Manager of Educational Supervision in Makkah; and the last meeting was with the General Director of Makkah General Educational District. The interview with the General Director of the No. 3 combined schools was held in the school's premises during the school visit. Naturally, the Head Teachers' interviews were in their schools at the beginning of the school visits. As mentioned before, the group interview meeting was with the Deputy Director of Makkah General Educational District, the Manager of Planning and Development Department, and the Chief of School Administrational Supervision Unit.

### **Type of planning and its effectiveness**

The first question was: What type of school planning do you have in your schools, is it short-term planning (daily - weekly), medium-term planning (quarterly - annually), or is it long-term planning (three to five years) or maybe more than five years? The General Director of Makkah Educational District confirmed that planning in most schools of Saudi

Arabia can be considered as short- to medium-term planning, because the Head Teachers were asked to plan how to implement their responsibilities during the school year.

**Management 1:** Regarding planning in schools, as we know what is happening now in most of our schools, as in most schools of Saudi Arabia can be considered as short to medium term planning, since the General Education District does not request from the Head Teachers a quarterly or annual planning basis. The Head Teachers are asked to plan how to implement the requested functions and responsibilities during the school year.

The Deputy Director of Makkah General Educational District was not satisfied with the current planning in Saudi schools. He described the planning situation as not scientifically based planning. Furthermore, he thought it was not based on the general plan of the Planning Department of the Ministry of Education. Additionally, he supposed it was personal perspectives from some Head Teachers. Nevertheless, he did not blame the School Head Teachers for this fault, and he gave many reasons that make schools unable to follow the organised scientific planning process.

**Management 2:** From my point of view, of course, school planning which is currently practised in schools is still planning based on Head Teachers' personal opinions rather than based on the general plan of the Planning Department or the Ministry. Until now, it is still personal thoughts or perspective from some managers or Head Teachers and executed in schools. However, from my perspective it is not a scientific method and it is not correct. Nevertheless, I do not blame the schools and Head Teachers and say they are not anxious about planning

or they failed in the planning process, because as we all know planning should come from the upper level of management as a public interest or general plan from the Ministry of Education and or the General Director of Education, and then comes from beyond these plans a short-term or long-term planning, that is implemented at schools.

I believe that there are too many reasons that make schools unable to follow the organised scientific planning. Perhaps the most notable reason is the lack of planning and training culture of school staff and administrators and its significance to school improvement. The other reason is the sweeping stream of work and tasks that is required to be implemented at schools without giving an opportunity for creativity or consideration of strategic planning or any type of proper planning. The third aspect is the non-existence of an administrative cadre in schools, or in best situations the lack of supportive administrative personnel at schools, which gives the manager no opportunity for proper planning and the follow-up of implementation. And that's why we started last year in trying to rehabilitate and train managers to plan and there were training programmes with professional trainers from the Kingdom of Saudi Arabia, and Kuwait including about 120 school principals. Therefore, I can say that regarding the school planning and whether if it is being applied in a scientific manner, or whether it is scientifically based, unfortunately I can tell you, by and large, no it is not.

The Manager of Planning and Development Department of Makkah Educational District described how the annual plans usually got to the schools from the Ministry of Education. He mentioned that the Ministry of Education was thinking of sending a suggested school

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action plan to be implemented in schools which might have several options for the Head Teachers to choose from.

**Management 3:** With regard to school planning in the Planning Department, I can tell you that until now, we in the Planning Department did not concern ourselves with school action plans. Usually the Ministry of Education asks for action plans from every district before the annual budget year. The suggested district plan is supposed to start with the beginning of every annual budget year and finish with the end of the budget year. Therefore it is an annual plan for every Educational District in the Ministry of Education. Consequently, the Planning and Development Department will fully cooperate with the School Administrative Supervision Unit at General Director of Makkah Educational District and generate a future operational plan for each school if it is requested.

The Director of Supervision Department at Makkah Educational District mentioned that the Educational Supervision in the Ministry of Education is commencing a new project called “the educational supervision in the era of knowledge” under which strategic planning is becoming highly required from everyone in the Educational Supervision Department.

**Management 4:** Very great welcome to you, my brother. Since you left Makkah Educational District several things emerged, but the most important issue is the change in educational supervision under the new umbrella that is called “the educational supervision in the era of knowledge”. The Ministry of Education is working on a new development trend for a year now. The objectives of this project

contain the supervisors' sufficiency, student basic skills, and teachers' proficiency.

**Ahmad Makhdoom:** Wonderful, you mean that the project focuses on three axes (supervisors, teachers, and students)?

**Management 4:** Yes, and the project aims to direct its actions to activate designing, improving and developing the mechanism of learning and teaching environments. As if you say that the classroom is first. The first element among the professional capacity required for supervisors' adequacy is strategic planning. Everyone in the administration is supposed to get this information and to have this skill. The quality test of the calibre is expected to be next year for the new supervisors, however; the test for old supervisors will be the year after that.

The Chief of School Administrational Supervision Unit of Makkah Educational District mentioned that the schools in Saudi Arabia were executing short-term officially recognised plans which most often came from the Ministry of Education.

**Management 5:** Schools in Makkah and in most of the Kingdom of Saudi Arabia are following a short-range planning process which is appropriate with the schools being operational units. We are executing officially recognised plans which most often come from the Ministry of Education; some of them are from the Department of Activity or the Department of Educational Guidance, as well as the Department of Educational Administration in the Ministry of Education. Furthermore, the school is operating in the light of the Head Teachers plan and the main axes to follow the path of technical and administrative work.

The Director of Educational Supervision Centre at Southern Makkah said that their annual

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plan was guided by the strategic vision of Makkah Educational District.

**Management 6:** At the beginning, we welcome you and thank you for this visit to our office. I think the issue of school planning is very important for the success of any institution or any action. I anticipate that the concept of Strategic Planning in general is present in Makkah Educational District. In fact it has a vision and they have started a mission statement and planning for the coming five years, from the beginning of 2007 to the end of 2011. I think the vision and mission statement of Makkah General Educational District are very clear and if you noticed it is at the door of the centre's building. Therefore we as an Educational Supervision Centre would like to operate and work in the direction of this overall vision and mission.

The General Director of the No.4 combined private schools said that they had the Company's Strategic Plan, and they were working toward achieving its vision.

**Management 7:** We do have a strategic plan for the company and the training that relates to it and we will be following this plan in our work.

### **The meaning of strategic planning**

The higher management participants' responses gave different views about strategic planning. Several of them had some information about the subject, but did not believe that it could be implemented at the school level for several reasons. The General Director of Makkah Educational District thought that the vision should be clearer and more detailed than the mission statement, in which points are comprehensive as possible. The mission statement in his opinion would be in fewer words.

**Management 1:** Vision is the last and real hoped-for image that a school or an institution wishes to reach at the end of the plan. The vision points should be mentioned in comprehensive and accurate ways, where maybe a percentage or numerical figures will be present. For example: To be the first company in Saudi Arabia. We agree that the vision is the perception of what could happen to our school. It is necessary to clarify what happens at the end of the plan, for example, to be the first company in Saudi Arabia and this is a good vision.

The Director of Supervision Department at Makkah Educational District revealed that the Ministry of Education was concentrating its efforts to train all the educational administrative personnel in the subject of strategic planning.

**Management 4:** We are intensifying our training and distributing this concept to the headmasters. I think the most important thing in Strategic Planning especially in the educational field is analysis. Therefore, if we prepare the staff to use a good mechanism of analysis in any way either the SWOT analysis or other means, then he can make a good strategic plan. If the colleague has the opportunity to master this skill, the process of analysis-mechanisms output will work. I think they can build a short or Medium-term strategic plan. I think also that long-term planning at school is not proper because school stability is not for long time. I think the system is unstable for the Head Teachers for more than four years; however, the medium-term planning “two to three years” is ideal.

Despite these efforts of the Ministry of Education towards the strategic planning issue, the Chief of School Administrative Supervision Unit of Makkah Educational District

thought that strategic planning cannot be applied in schools, because schools are the smallest operational unit of management.

**Management 5:** It is well known and recognised that strategic planning is a scientific activity, usually strategic planning is long-term planning and on a national level, particularly in developing countries, specifically in Saudi Arabia. In developed countries in the West they may have a Head Teacher that has very great powers and authorities that may resemble the powers of the minister we have, so he can make and serve the strategic plan. Because I have seen a strategic plan built for the central management and graduated to the middle administration and then to the executive units, but did not reach in its entirety to the field “schools”. However, it arrived in the form of action plans for schools. Because as we all know schools are operational units. Although Strategic Planning is a scientific activity universally recognised it is very difficult to apply in our schools, from my point of view.

**Ahmad Makhdoom:** You have said “very difficult to apply” does that mean it is impossible to apply?

**Management 5:** It is not impossible, but with the current conditions of our schools that the school often is a point of executing, it is difficult to achieve. Of course, the principal can be involved with his colleagues at the school to try to develop something and have something planned for the school in the academic year in the light of the instructions he had, and monitor the execution.

**Ahmad Makhdoom:** On this basis, what does the concept of school strategic planning mean to you? In other words is there a certain concept such as school

strategic planning to you or there is not such concept in school?

**Management 5:** Which school?

Maybe he did not understand the question, or he was gaining some time to prepare to answer. Then the interviewer responded: “any school and at any general educational stage, maybe elementary, middle or secondary school.”

**Management 5:** The concept of Strategic Planning is an existing global concept, but from my point of view it cannot be done in our schools in the current circumstances.

**Ahmad Makhdoom:** In your opinion, why can't we operate a Strategic Planning model in a regular school? Moreover, what are the barriers or difficulties in getting out the Strategic Planning components so that the school could not operate within the school strategic planning?

**Management 5:** Let me ask you what is your concept of school strategic planning?

**Ahmad Makhdoom:** I'm supposed to ask you this question; however, in my humble opinion it is that strategic planning can be applied in any place, with any communities, with any people and in any institution. Even in school, classrooms or families. My view of school strategic planning is when the Head Teacher meets with all key school stakeholders and tries to agree on the school Vision, Mission Statement, Values and Goals; these goals will not depart from the Kingdom's educational policy and the educational stage objectives, as well as the vision of the educational district if it has a certain vision. These objectives and targets should

include all school environment areas both inside and outside; beginning with lifting of the students' achievement level through school-parents relationship improvement, teachers' professional growth, administration professional growth, school building, and so on... Since the Strategic Planning Team is part of the school, they should identify school improvement areas and development priorities in the plan over the strategic plan period based on the school's circumstances and possibilities; in addition, of course, it permeates, developing methods for monitoring, revision and evaluation continuously or periodically.

**Management 5:** Okay, very beautiful; during how many years or period of time should a strategic plan remain or take place and achieve the vision?

**Ahmad Makhdoom:** Strategic Planning periods are usually from three to five years in every school, but it has periodic reviews in each semester and at the end of each year to know what we have achieved and what remains.

**Management 5:** Okay; good, now I can say that it is possible to apply this, but it is still difficult for school Head Teachers, especially if there is no adequate training for them.

Finally, he was convinced that this kind of Strategic Planning Model could be conducted in the schools. Nevertheless, he thought that they needed intense training to master the skills.

### **The application of Strategic Planning in our schools**

The General Director of Makkah Educational District had nearly the same idea of the level of applying strategic planning. He thought that the school role as an operational unit in the

Ministry of Education might limit the validity of an independent school vision. Moreover, he believed that the top leader should create the vision alone, and then he should try to achieve it with the stakeholders.

**Management 1:** As you know, that the operational role played by the school in the Kingdom may limit the validity of creating a vision that is completely independent from the Kingdom's Educational Policy. In addition the school vision should not be apart from the Ministry's objectives as well as the objectives of the General Education District. Furthermore, I think it would be a better vision if the leader himself sets the vision and then tries to achieve it with all those with him from subordinates or employees.

The Manager of Planning and Development Department of Makkah Educational District supposed that the schools and the Ministry had a planning crisis and a lack of planning culture. Moreover, he thought that the Ministry's plans were just sets of activities or tasks which were programmed in a given time and they called it a plan.

**Management 3:** In fact, we are in our schools and ministries in general almost everywhere having something called "planning crisis" and considerably a lack of planning culture. This is something we were raised with. The same thing is happening now in schools; they say that they do not have the opportunity or the time. It is break away from telling that they do not have the capability or the knowledge to plan. Basically, they don't have a plan. Planning is very important and we have a very weak planning culture. Moreover, the plans that come from the Ministry's departments are only plans by name. They are just sets of activities or

tasks which are programmed in a given time and they call it a plan. It was not based on school potentials, school capacity nor the risks and opportunities. Because the real analysis, studies of reality, diagnosis of school to give appropriate plan does not exist. We all know that schools are different in physical possibilities, capacity, qualification, and some other things. So the planning should be estimated and operated upon school internal and external potential abilities, chances, weaknesses and strengths. Any headmaster says he has no time to plan, we would say it is bad explanation from weak administrative headmaster who has weak managerial ability, and we should not accept this excuse.

Management 3 thought that it was possible for school strategic planning to be implemented in schools, but it was obligatory that the plan must be not inconsistent with the Educational Policy of the Kingdom and the Ministry's plan, in addition to being seen to be emerging from the General Educational District's plan. His reason was:

**Management 3:** In order not to be faced with much opposition by the inspectors or supervisors. Additionally, the General Educational District can manage to support the programmes and projects included in the strategic plan, materially and morally. Hence it is better in the operational plan to be detailed in its financial resources and budget and explain how to get it. Anyhow, I think it is a must to take the consent of the General Educational district to begin before the implementation of the strategic plan; so as not to disrupt the plan.

The Deputy Director of Makkah General Educational District agreed to the latter opinion, but he had some hesitations concerning the vision to be developed by the school without

the Educational District's confirmation.

**Management 2:** I said it must be in accordance with the school objectives, functions and authority in line with the General Educational District' plans, which are usually based on the Ministry's plans. However, I'm keeping my hesitation on the spread of school strategic planning application being without scientific knowledge and intensive training of teachers and Head Teachers; because then strategic planning will focus on problem-solving. Whereas school strategic planning is not just planning to work out problems and this is not good planning. Planning to address a specific problem is partly one of the jobs that planning typically does. Therefore I am afraid that the rush to apply strategic planning in schools leads to the neglect of key aspects of the school goals, and becomes a focus only on certain problems, with my conviction that even though focusing on certain problems in the light of the permanent movements of teachers, deputies and Head Teachers may be impediments to school strategic planning implementation. I am afraid of another point that has great risk, which is leaving the chance to schools to create their vision, mission and objectives.

**Ahmad Makhdoom:** What are these risks? Would you please explain?

**Management 2:** The risks are the fear that "the vision will be limited to a certain part of the school activities", thus becoming at the expense of other essential aspects or disrupting the entire educational process at times. For example, who applied or achieved this vision based on list of goals set by or under the vision, mission statement will focus on essential aspects and neglects important issues; and

then the neglecting of these issues will be a problem in itself that compounded and developed. And that's why I say that this vision of elementary, middle schools or secondary schools should revolve around the general goals of the various stages in the education policy in the Kingdom. It is great that the school Head Teacher can make the vision and mission statement; however, now it seems to me that we need to have a clear vision, mission statements and goals that do not conflict with the General Educational Goals of the educational stage. Moreover, the Educational District should revise them and approve them; because, the Head Teacher has no right to make school goals that are inconsistent with the educational policy in the Kingdom of Saudi Arabia.

### **The adoption of school strategic planning**

This question was put to the General Director of Makkah Educational District: "If we looked at the countries surrounding us for example, Jordan, UAE and the Gulf countries; school Strategic Planning has already reached the field. I mean, for example, if we search the Internet we will see hundreds of schools have school strategic planning." He replied by clarifying some reasons for the others' adoption of school strategic planning.

**Management 1:** I asked who trained our brothers in the UAE, they said they are in the beginnings. The Educational Administration in Abu Dhabi made its strategic plan and there was a scientific supervision, but I doubt the proper implementation ability of schools leadership there, I am afraid they are only showing of a fine crystals. In the other hand, Jordanians are old-timers in the process and their cultural awareness is high in Jordan; moreover, many of them are Palestinians, the Palestinians are educated people, in addition they have resolution from higher

management. Also, one of the constraints is that teachers in the private sector have a stronger acceptance and are more responsive than the public sector, where teachers in public school sector have more resistance to change and more struggle.

The Director of Educational Supervision Centre at Southern Makkah thought that the reasons were due to the Ministry of Education's centralisation system, besides the senior management personnel continually changing.

**Management 6:** In my opinion, the first reason is the centralisation system of working or what they call the work logical sequences of administrative or management structure. That system requires the administration's policy to be line accordance to senior management ideas. In addition, the ministry's plans were not clear in these aspects due to changing people in charge most of the time. In general, we know that our Ministry still working by individual thoughts most of the time, and not working by institutional ideas. I mean many designs have been made by one central person or at most small group of people. Therefore the designs could be ignored or finished after this one is out of his office. Strategic planning, vision or missions need to be institutionalised to work. For the reason that they are not to be interrupted in the course of a year or two, the change must continue until the objectives are achieved. Individual work and changing people's positions most of the time lead to disruption of the vision and mission, as a result disruption of the programmes. If you had strategic planning you will need clarity and adherence to senior management, in addition to senior management changes may withdraw smaller departments and force them to stop and discontinue. As a result they will go back to square one. However, I think in the neighbouring countries there are less

changing in senior management and there are clear planning processes. I think everyone has a clear view about the programme or project he is involved in, senior management and middle management tell the smallest units, they all have clear and full understanding about their mission and their authority.

### **Luxury or necessity?**

All the participants in the higher management interviews agreed that school strategic planning is not a luxury activity. They thought it was necessary for various reasons. The question was: “What do you think of school strategic planning, is it a necessity or luxurious in our schools nowadays?”

**Management 2:** I said school strategic planning is necessary, yes it is a necessity.

Some of them had some hesitations, such as the Manager of Planning and Development Department of Makkah Educational District; he thought schools should operate a flexible strategic plan under the Ministry’s plan, because the Ministry of Education has definite targets for each school in each stage that should be accomplished within the overall school strategic plan.

**Management 3:** Surely it is a necessary process nowadays; because the strategic planning can be implemented on an individual level, however putting in mind that schools are executive units, and imagine when hundreds of schools making strategic planning on an individual basis; there may be a conflict of interests. Therefore, the school is supposed to operate a flexible strategic planning under the Ministry’s plan and develop the school. It is possible also to coordinate with the General Educational District plan in the city or province. So as not to create a

strategic plan and then different instructions come from here and there to change systems or regulations of most important areas such as the examinations. Consequently, you will not be able to implement the plan and you can't perform your required duties. In addition the Ministry has a certain number of goals and targets for each school that should be achieved. Since every school is different from other schools in terms of potential, opportunities and threats, there is something very important that needs to be determined; the strengths and weaknesses and to any measure. There must be indicators, whether if they are regional indicators, national, or universal, so that we can measure the level of improvement and development in our performance.

The Director of Supervision Department at Makkah Educational District mentioned that they were working for the next phase of placing school strategic planning as a mandatory skill for every educational administrator in the Kingdom.

**Management 4:** The strategic planning process is becoming mandatory. We are working now for the next phase. We are preparing ourselves to be familiar with the new concepts, and to make medium-term planning. We have established our bulletins, planning for meetings, seminars and workshops to provide us and our colleagues with the right tools to enter the new era of knowledge. The next academic year will be the time for implementing several workshops, Strategic planning will be the first in the list. )

The Director of Educational Supervision Centre at Southern Makkah believed that the process should be put among the top priorities in the educational field nowadays for its

efficiency and success in several similar schools around the world.

**Management 6:** I believe that strategic planning in any institution is not a luxury but on the contrary, it can be among the top priorities of the school needs at the present time. These new concepts such as total quality management and strategic planning are very important in any educational institutions. You know they work effectively in general management and professional factories. Therefore, I expect that, why it should not work and succeed successfully in our schools? Needless to say that it has been tried and succeeded in several schools similar to ours around the world.

The General Director of the No. 4 combined private schools had the same belief for fulfilling the school vision and targets.

**Management 7:** It is very important because it fulfils the vision that leads to targets.

### **The obstacles to school strategic planning**

The General Director of Makkah Educational District expected that there would be genuine and circumstantial impediments to the application of Strategic Planning in schools. During his interview, he mentioned several important points that could be considered as serious obstacles to strategic planning. He said that the configuration is the problem. Then the researcher asked him to explain more.

**Management 1:** There are genuine difficulties and there are difficulties as circumstantial depending on the situation and need for each school and team work.

Consequently, the original difficulty is the structural organisation of the system. The structural system is centralised, and the fields or schools especially the final executive terminals in the field or Head Teachers are not decision-making units.

**Ahmad Makhdoom:** The schools are not decision-making units!

**Management 1:** They are decision-making units, but they are not decision-making units in strategic planning, though the formation of a strategic decision and the order in our system gives the school, which is the last attached terminal in the system, the power of creating schematic operational execution, including the Educational District. I am scientifically surprised by several plans that reached us that there are school strategic plans, because I read in the literature that the leader writes vision and manufactures it, and vision is what the leader wants and not necessarily to collect all the participants' perceptions in the process and make the vision with them. Hence the Educational Administration's vision can be manufactured as well as the school vision, but you must create a vision within its borders and within the vision of senior leadership, which is the Ministry and the Educational Administration and within the general framework of the Ministry's plan and the Educational administration.

In addition he revealed that most people were frightened by the word "strategy."

**Management 1:** We have a problem with the word "strategic" for which there is no equivalent word in Arabic, and this will be a big problem in the whole of your research, people will be troubled with the word especially the ones that have no English language knowledge. Additionally, you are requesting to create the word

strategy in an organisation that does not give such authority to the middle management, to us as Educational District or to the field leadership in schools as the Head Teachers. Please Mr. Ahmad; strategic plan is the job of the Ministry of Education, as they see it. Therefore, in this light the Educational District and the school manufacture their operational plan and this is the original structural impediment.

**Ahmad Makhdoom:** You mean centralisation!

**Management 1:** Of course we call this centralisation or not, this is another issue. Because when you said centralisation; you are giving an indicator that is in the negative side.

**Ahmad Makhdoom:** Centralisation is not necessarily always a negative word.

**Management1:** Of course, not necessarily. I believe that the final solution to the current defects in education nowadays is only to give the school more ability to become a decision-maker. Plus, the current situation will not improve until the schools become independent units. However, I'm the first to say "not now" because there will be problems and chronic deficits.

One of the main obstacles is the administrative culture and awareness, because you are now presenting high value concept in administration, while we are now barely to consider the ABC of administrative practice. Strategic planning needs mature people administratively; we need mature leadership in schools and people that have the benefits of the administrative culture. I am afraid that the field is not ready yet. Plus, I am afraid that the ending of a strategic plan will be to develop as beautiful

crystal or wall painting without real implementation; because the strategic plan requires real effort and commitment.

And also one of the obstacles is the incomplete formation of human resources in Saudi schools, and you saw in Britain, there is the formation of integrated management in schools that assists the leader in the development and implementation of the plan; and I think this may sharply damage the schools of the Kingdom. Sometimes several complaints came against Head Teachers, that the Head Teacher did so and so, or he was not able to do so and so, and must be given a word of warning or be punished, I understand the Head Teacher's situation and tried hard not to blame him for everything. The Head Teacher could not be held responsible for non-completion of the school staff. The Head Teacher has to have complete school staff to help him such as an activity director, assistant teachers, assistant administrators and specialists; this does not exist in our schools. I would say to them, please, it is adequate that he is carrying out the possible school management process, and no matter what performance is despite his current circumstances, he is sometimes the observer, the reporter, the director and teacher of many things as well. While strategic plan is perfection and strategic plan is futuristic and needs cadres; this is also a severe handicap for strategic planning, I do not want to discourage you and mention the most difficult things but this is the truth.

The Deputy Director of Makkah General Educational District described planning as a dark valley in Saudi schools therefore they should build an intensive training programme for all the stakeholders in order to be successful in the strategic planning project.

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**Management 2:** Planning is still like a dark valley; therefore, we should build a comprehensive knowledge about the topic of strategic planning. Also school community, workers, and administrators should obtain such knowledge. Because even if the director has a background in planning and wanted to plan, but the workers are not motivated, the implementation will fail and not succeed.

The Manager of Planning and Development Department of Makkah Educational District agreed to the latter opinion and he added that planning is still frightening to some people.

**Management 3:** Planning is still a frightening process to some people, whereas some felt that planning is not important and they are not interested in it. Also we need to practise the preparation of a strategic plan and how we train Head Teachers to build a plan from the start. We need training in how to create the school vision, mission and objectives.

The Director of Educational Supervision Centre at Southern Makkah thought that the Head Teacher is the key person in the process. Therefore he should be well trained to master this skill, or he will be our major concern.

**Management 6:** The leader of the school or the Head Teacher is the key person in all this process. If he believes in the importance of the change and the importance of the programmes; and has had sufficient knowledge about this culture to make it available to his colleagues, he will help implementing school Strategic Planning successfully. Then he will not be an obstacle. If not, he will be your major concern. I mean if the Head Teacher is a closed minded person, has not enough leadership culture, he does not believe in change and development, and he is only executing

the orders, he will be a big problem. Also, you may find obstacles from a group of teachers who are close to retirement or their services are close to completion; they will rarely welcome any changes. Moreover, schools' potential in terms of student numbers and in terms of schools' technical resources is very important and influential on the process.

The Chief of School Administrational Supervision Unit of Makkah Educational District mentioned three factors as barriers to school strategic planning in Saudi schools: the school being an operational unit; the lack of time to conduct the project; and the shortage of school personnel, besides the weakness of the existing planning culture.

**Management 5:** First of all, the school is an operational unit. And, secondly, the headmaster, the vice-head and members of the school and educational community are now busy with enormous responsibilities and they have no time or ability to make sure that their plans are correlated horizontally and vertically with the plans and objectives of the Ministry. In addition, due to a lack of personnel and the weakness of the existing planning culture they are not able to work out follow-up plans. I mean, it requires a specialised team and a large organisation.

### **Benefits of school strategic planning**

The Director of Supervision Department at Makkah Educational District thought that part of the significance of school strategic planning was to give a sense of united direction to the school stakeholders, in addition to increase the loyalty.

**Management 4:** I suppose everyone agrees that strategic planning is very important and we need it in our schools nowadays. I think it is enough for strategic

planning to give a sense of united direction to the whole school and everyone around the school. In addition, school strategic planning can increase the loyalty among the school team and everyone in the school. School strategic planning might give the school more freedom to operate effectively.

The Director of Educational Supervision Centre at Southern Makkah said that strategic planning would create more understanding and harmony among the school surroundings.

**Management 6:** This will create more understanding and harmony among the school surroundings and serves the main goals of the school from administrative, technical and social aspects. Normally, any leader who wants to create the school vision must think of the Educational Policy of the Kingdom of Saudi Arabia, the Ministry's vision and the Educational District's vision, this must be taken into account.

### **Permission to conduct school Strategic Planning**

In this part of the interview the question was: "Should schools obtain permission and approval before the start of the Strategic Plan process, or work it out and then present it to officials?" Most of the higher management personnel concentrated on the point of the co-ordination between the school and the district during the process. The Deputy Director highlighted the need for a qualified team leader to conduct the project.

**Management 2:** The Strategic Planning team must be scientifically qualified first, before the planning occurred. They must be trained how to plan. And secondly that there should be co-ordination and continued communication in the case of school strategic planning at every stage and then to begin the implementing process if it is

approved. Also there must be contributions from all school participants and school key stakeholders.

The Manager of Planning and Development Department of Makkah Educational District add that the plan should be compatible with the Ministry's regulations and instructions.

**Management 3:** The plan should be drawn up by scientifically qualified persons and those with high expertise in this area. In addition plans should be compatible with the regulations and instructions.

The Chief of School Administrational Supervision Unit of Makkah Educational District added that the plan should not contradict the Saudi General Policy or have some factors contrary to the security of the country.

**Management 4:** I would like to add that it is not acceptable if the plan came with specific trend that is not consistent with the general policy of the Kingdom or working against its fundamental security.

The Director of Educational Supervision Centre at Southern Makkah thought that school Strategic Planning did not contradict the Ministry of Education policy.

**Management 6:** school planning should not deviate from the general framework of the Kingdom's Educational Policy. School vision must not move away from the Educational District goals and objectives. These points should be in front of each Head Teacher while creating the school vision and mission statement. Perhaps this sequence will greatly help the success of school strategic planning and education in general.

## **Support for School Strategic Planning from the authority**

By and large, most of the higher management authority assured the author that they would support the school strategic planning process if it was in fulfilling to the Saudi Educational Policy and the Ministry of Education's ambitions.

**Management 2:** I wish that it is clear to you that we are not against strategic planning; we are in favour of planning, but only the proper scientific planning. And that means if a Head Teacher came with a school strategic plan, I cannot tell him God's blessing with you, go and implement the actions. The plan must be referred to a specialised team in this regard and see if it is consistent with the Ministry's goals, the Head Teacher's authorities and school environment and possibilities.

The Manager of Planning and Development Department of Makkah Educational District said that the District Administration will support the plan if it succeeds in maintaining the Kingdom's invariables.

**Management 3:** I can say and guarantee that any school which provides a strategic plan will not be rejected by the Administration and will have the support if it succeeds to maintain the invariable. I mean, for example, if the plan wanted to examine additional materials, curriculum or to increase curriculum associated activities or required changes in curriculum enhanced activities, with maintaining the quorum for teachers and or class hours there will be no problems. However, if you came with a strategic plan that changes everything, that is illogical; for example, the recruitment of female teachers in boys' school. Or request shortage in the number of the school day's hours or increase them to a large extent; of course

this is unacceptable change.

Likewise, the Director of Educational Supervision Centre at Southern Makkah assured that the Supervision Centre would help the schools achieving their vision and goals to all capacities and possibilities.

**Management 6:** Generally we would not hesitate to help them in accomplishing their vision and mission obviously, if they are not contradicting the Ministry's goals we will support the school with everything we can. As I told you at the start that vision should not depart from the policy of Education and the Ministry's goals. I believe that the centre will never be an obstacle to the achievement of a true and clear vision. Consequently they should not contradict with either the existing school planning or the district objectives. But in favour of the schools that are essentially within our project of the Outstanding Schools Programme, I expect they will be supported through our goals and our vision for these schools.

Following these interviews with the senior management, we now turn to the case studies of the schools.

## **Twelve Schools**

Twelve typical schools will tell their story of the problems involved in implementing the MSPM.

As detailed in the previous chapter, the schools were selected to form a representative sample. The three city schools were: Elementary School No. 1, Middle School No. 1, and Secondary School No. 1; the three village schools were the No. 2 combined schools; the three private boys' schools were the No. 3 combined schools and the three private girls' schools were the No. 4 combined schools.

The schools labelled No. 2, No. 3 and No. 4 are combined schools, which means that each school has the three educational stages within its premises: elementary, middle, and secondary school under the same name and in the same location. Each combined school has at least two head teachers, one for the elementary stage and another for the middle and secondary school. Likewise, usually the combined schools have more than one deputy; one for the elementary, and the other for the middle and secondary parts of the school. Sometimes such schools have three or four deputies, depending on the school size and student numbers. The No. 2 schools were selected to participate in the study because they are average village schools and they have one head teacher; whereas the No.3 boys' schools were preferred as they are examples of standard private schools; however, the No. 4 girls' schools were chosen for the reason that they are girls' schools.

The other three schools were individual schools, which mean that each school has just one educational stage. For example, Elementary School No. 1 has just the elementary stage, and they enrol students from six years old to twelve years old only; while Middle School No 1 offers the curriculum of year Seven, Eight, and Nine only, most of the students being from thirteen to fifteen years old. Similarly, Secondary School No. 1 has the secondary educational stage students only, and its students are from sixteen years old and above. This school is one of three secondary schools in Makkah that operate the Secondary Developed

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Curriculum Programme, which depends on specific credited hours for each subject; the other schools have programmes of three years fixed subjects, and the students cannot choose the subjects or the teachers they prefer each semester.

## **Case One: Elementary School No. 1**

### **Boys – Government – City School – School Building**

#### ***School characterisation***

**School Stage:** *Elementary*

School Head Teacher: *1*

School Deputies: *2*

Number of classes: *19*

Number of teachers: *34*

Number of students: *549*

Number of admin staff: *5*

**School location:** *Makkah*

Building type: *Government*

Number of laboratories: *1*

Type of playground: *Excellent*

Is it a combined school with other stages? *No*

Is it a governmental school? *Yes*

Does the school have a strategic plan? *Yes*

Does the school have a vision? *Yes*

Does the school have a mission statement? *Yes*

What kind of plan does the school have? *Five years strategic plan*

Is it a head teacher's plan? *No*

Is it a school plan? *Yes*

Is the school under any educational experimental programme? *Yes*

Elementary School No. 1 was a government school located in Makkah the Holy Capital, in a very modern governmental school building. There was one head teacher, because it was an individual school with just one stage in its premises; the school had two school deputies, one student guidance tutor, and one student's activities leader. The school consisted of nineteen classes: in grade one there were four classes, but from grade two to grade six there were three classes in each grade. There were thirty-four teachers for nearly five hundred and fifty students, in addition to five administration staff. There was one science laboratory in the school, and one large resource department that consisted of one big library, thirty computers and internet stations, one smart board, and one data show projector. The school also had excellent playgrounds with football field, basketball and volleyball field.

Elementary School No. 1 was the first school in Makkah city to have its own school strategic plan, and its own vision and mission statement. In 2005, this researcher helped them as a facilitator to implement their school's five-year strategic plan. It was a school plan that covered all the school personnel and teaching activities. The school was also under two educational experimental programmes: the Outstanding Schools Programme and the Teaching Strategies Programme.

The school had a very good educational leader who received his own elementary education from the school. He succeeded in motivating all the small groups of teachers in his school to focus on achieving the school vision and mission statement. New teachers with hardly any experience and very old teachers with one or two years left to their retirement, highly

qualified and trained bachelor's degree teachers alongside secondary educational school teachers: the co-operative teamwork in the school was able to change the image of the school within less than three years. Now the school is not only the most desirable government school in the area, but it is also preferred over many private schools in the neighbourhood.

The timing of implementing the school strategic planning was ideal. It was two weeks before the beginning of the school year. Every Saudi Arabian school has this time to prepare for the new educational year and to conduct the reset exams for some students. Most of the teachers in this time are relieved of real work and have almost nothing to do. The Head Teacher provided the team with every necessary equipment, encouragement, food, and support to participate in the school Strategic Planning Project. In addition, he was with them step by step despite his responsibilities. Almost all the teachers in the school participated in the project in a very organised agenda.

The Head Teacher's role in selecting and organising the team was very significant. He knew everyone of them; therefore he chose the right group for the right part of the project, with the help of the author as facilitator. Five groups were asked to develop and suggest the school vision during the workshop. Every group strongly recommended their vision and tried to defend their ideas. The facilitator gave them some time to debate, and then he took their votes to select the keywords from each suggested vision. There were about fifteen selected words. Another voting process took place to minimise the possibilities, until they reached seven intensive keywords. Finally the vision statement was developed by connecting these keywords. Everyone felt that this final vision was his own vision, they all participated in this creation process and they were happy. The same techniques were

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used in developing the school mission statement and the school values. The optimistic teachers participated in stating the strengths and the opportunities in the school, while the pessimistic teachers were involved in declaring the weaknesses and the threats in the brainstorming sessions. The process of developing the school strategic plan was completed within the two weeks' time that were planned for the project, and everyone was happy about the results. After finishing the workshop an old teacher told the researcher that it was their first time to gather and vote for any decision related to the school.

The school visit and interview for this case study took place three years after introducing strategic planning into the school, and the interview responses reflected this situation, which was different from the other sample schools. The study interviewed the school Head Teacher and the school Students' Guidance Tutor individually, but the Deputy Head Teacher, the Students' Activity Leader and a teacher in group interview.

### ***Interview analysis***

The interview with the head teacher of Elementary School No. 1 and some of the school Strategic Planning Team took place after introductions, expressions of welcome and gratitude, definition of the research and asking for permission to record the meeting to be used in the research only. They agreed that their real names could be used in the study; however, codes have been used for reasons of confidentiality. (These procedures were carried out with all participants at all the schools). The first question was:

### **Type of planning**

**Ahmad Makhdoom:** What type of school planning do you have in your school, is it short-term planning (daily - weekly), medium-term planning (quarterly - annual),

or is it long-term planning (three to five years) or maybe more than five years?

This question was the opening question in almost all the initial interviews with all the participants in the schools as well as the higher management personnel and it can be noticed that there is no mentioning of strategic planning in the opening question. The answers were different in each interview, however; with the Head Teacher, it can be noticed that he was proud of his school vision and talked about it in his answer.

**Head Teacher 3:** Our plan is long-term planning of course. We started working with it almost three years ago and we will continue to do so after putting a vision for the plan which is “[Elementary School No.1] is the Schools’ Model for a Distinctive and Creative Generation”. We have now accomplished excellent progress, and the proof of that is the visit of most of the colleagues from Educational District and the Ministry of Education due to the existence of modern methods at our school and the acknowledgement of the teachers.

The school Deputy Head answered in a different way, maybe because he was responding on his own action plan. He said:

**Deputy Head 4:** At the school it is quarterly planning and some of the quarterly sections depend on the monthly and weekly planning. It is really a plan for the requirements and nature of the work, i.e. facilitating and promoting the operation in order to revise and improve the same. It is merely a schedule of the tasks or a timetable.

In the same group interview with the Deputy, another teacher, an Islamic Education teacher and Student Activities Leader (SAL), responded in a very different way, talking

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about his personal attitude toward the planning issue and mentioning in some way the strategic planning notion when he said:

**SAL 2:** As a teacher, my vision is not different to the school's general vision which we put together. [Elementary School No. 1] is a model school for a distinctive creative generation. My plan is to create an Islamic character within my subject prior to being tested for skills or passing at fifty percent or hundred percent. I concentrate on getting a student graduate from elementary school with at least the provisional principles. This stage is very important for students which means that you are trying to develop a specific Muslim character.

Elementary School No 1's Student Guidance Tutor (SGT), who was one of the participants in putting forward the school and also participated in setting the strategic plan for the school three years ago, said in an individual interview that:

**SGT 2:** We have daily, weekly, monthly and quarterly plans for students' supervision at the school, as well as an additional plan for emergencies; therefore the Student Guidance has more than one plan to follow. As for the issue of strategies, we find that sixty percent or seventy percent of our society has no full or clear understanding of Strategic Planning and strategies in general. Furthermore, most of the colleagues in this field work according to their experience and take decisions accordingly without any documented planning; even though working according to a plan is clearer and more precise and comprehensive.

From their responses it can be noticed that they all put their operating action plan under their school mission statement that depends on the school vision, despite the different

responsibilities of each of them.

### **Experiences in strategic planning**

Clearly this school team had some kind of experience with the school Strategic Planning Model, since they had put in action their school vision for almost three years now. However, everyone answered in a different way in describing these experiences. When the Head Teacher was faced with this question:

**Ahmad Makhmood:** What does implementing school strategic planning in Elementary School No. 1 mean to you?

Focusing on the emotional and loyal part, being a son of the school many years ago, and mentioning that strategic planning is a modern way to achieve society's needs, he replied that:

**Head Teacher 3:** Strategic Planning means a lot to me, as I graduated from this school myself. I wish to do good things to serve the education and teaching process. Strategic Planning means a lot to us as, in our opinion, it helps in creating new and modern methods that go along with the society's needs and the Ministry's plans in respect of teaching, as well as the teachers' work, and the Student's reaction in respect of the educational process as a core for this modern method, which helps the Student to get a clear viewing of the system.

The Deputy connected strategic planning with promoting and facilitating the school improvement, at the same time as achieving his tasks.

**Deputy Head 4:** It is really a plan for the requirements and nature of the work, i.e.

facilitating and promoting the operation in order to revise and improve the same. It is merely a schedule of the tasks or a timetable.

The Islamic Studies Teacher mentioned his three years' experience with the school vision, bearing in mind the limitation of higher management requirements and demands. Furthermore he pointed out that the teachers' priorities in distributing the curriculum's subjects in respect of the school vision may change from teacher to teacher.

**SAL 2:** It is really a method of implementation more than my personal strategic planning within the limits of the requirements that are demanded of us by the Ministry or the Educational District or the school's administration. The method of implementing the tasks differs from teacher to teacher, in other words, it is merely distributing the subjects in respect of a vision and based on the meeting that took place 3 years ago.

The school SGT described what he gained personally from planning, in addition to some of the benefits of evaluating the achievements to continually improve the work. It seems that he learned how to plan himself as an alternative to following a pre-made and fixed plan for his tasks.

**SGT 2:** I think it is a model for doing our work the correct way, as it enables you to assess positive and negative actions and it gives you studies on progress of the planning. It also enables you to find advantages and defects in your work from which you can benefit in the coming years to improve the work.

They all talked positively about their experiences, and their satisfaction with the Strategic Planning Project in their school was very obvious. It seemed that they considered the

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school strategic planning process was related to their school improvements and the good progress side of their accomplishment.

### **Meaning of Strategic Planning**

The interviewer next moved them from their experience in strategic planning to what they think strategic planning is. The Student Guidance Tutor talked about the school vision as a tool of measurement that directed them to achieve their tasks and make the entire school's stakeholders united in the same way.

**SGT 2:** Strategic planning can help you get specific measures of your work and its progress. This measure can be the vision or the mission statement, results of which I can acknowledge. It is the same with the others, or the society or students because they are all supposed to have participated in adapting the same vision and mission.

The subject teacher/SAL explained some of the strategic planning elements or needs, mentioning that any individual implementation plans or techniques used in the school should be developed according to the school strategic plan.

**SAL2:** As I understand it, for strategic planning I should have implementation plans and techniques. A school might have a plan but it could differ from one school to another according to the understanding of those who had met for the purpose of implementing this plan. Strategies of an individual's thinking are merely tools or technical methods which need certain time to be implemented. Naturally planning is a big circle after which come strategies of implementation methods whether through human energies, financial force, period of time or costs,

which you have to think about providing these elements.... etc.

The Deputy Head Teacher described strategic planning as planning for future progress that has different alternatives to carry out its goals.

**Deputy Head 4:** In my opinion, strategic planning is planning for the future but each individual acts differently from the routine sometimes. With strategic planning you should always have a replacement plan in the same field which serves the same objectives. In order to go along and remain in progress, this is my understanding of strategic planning; I always have a ready replacement plan.

### **Benefits of strategic planning**

When they were asked this question: “What are the benefits of Strategic Planning in your opinion, and what has the school gained by it?” they considered that having a school vision and mission statement were the things that they were most proud of, and were the first benefits of the Strategic Planning Project in their school. Making outstanding progress towards achieving the vision and the mission statement, which made the school community united and working in the same direction, was another important benefit of school strategic planning. The Head Teacher said:

**Head Teacher 3:** we gained many good and nice things from our vision: firstly, improvement of the teaching standard for the students, which was noticed by the students’ guardians who co-operated with it favourably. We continuously analyse our results which have so far been respected especially by the existence of a large number of students at the school and the increasing approach to the school. Efforts are always being rendered for continuous improvements and the results are quite

clear.

**Ahmad Makhdoom:** Do you think that the existence of one vision in the school would strengthen and unite efforts which might lead to completeness or to competence?

**Head Teacher 3:** Vision should be comprehensive in all aspects and opportunities to the school as this would unite the efforts and assist students' guardians and teachers and also the Students themselves. Nevertheless, it might lead to positive competition amongst teachers in the same school, and amongst students in the same school; in addition to positive competition among other school.

The SGT talked about the strategic planning benefit as a reflection of one's work that helped him to fulfil his targets.

**SGT 2:** Strategic planning has many advantages such as being a measure you can revert to and base your work on. You determine your target and watch it being fulfilled from stage to stage and you get to see the defects in order to avoid them. Strategic Planning is considered a reflection of one's work.

The SAL Teacher mentioned that Strategic Planning had changed the teachers' attitudes positively and made them more disciplined and obliged toward the vision.

**SAL 2:** Strategic Planning has changed the attitude of the teachers, their discipline and obligations towards the students, which has resulted in creating this distinctive creative student.

The Deputy Head Teacher declared that a clear school vision united the stakeholders to

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achieve the progress they wish to accomplish.

**Deputy Head 4:** Any individual whose work is well planned, then the implementation of the operation will be facilitated and the progress will be smooth. Moreover if the vision is clear then the teacher and all the school's associates are obligated. I mean when a teacher is in class with a planned subject then he will deal with all individual circumstances. He would also have a replacement plan in order to resolve all differences and resume fulfilling his target in a much better method.

They had seen different benefits gained from conducting the strategic planning and choosing their vision. Students, teachers, and parents were participating in the school improvements. The vision changed the attitudes positively and gave them some sort of measurement tools that allow them to keep progressing and working together to fulfil their aims.

### **The effect of school strategic planning**

The next answers described how strategic planning affects the school image, the teachers, the students, and the guardians from their point of view. The next question was: "How have the teachers benefited from the well appreciated vision that exists in the schools?" The Head Teacher mentioned that most of the teachers were trying to be creative themselves in applying programmes and activities that were held inside or outside the school.

**Head Teacher 3:** It has actually created a good and nice incentive for the students who have started mentioning the vision "The Schools' Model for a Distinctive and

Creative Generation” at all occasions. The students have also started to compete in creation of programmes for internal and external competitions. The school has, during the past three years, reached the first position in the scouts and theatrical activities, which means that there is a good impression with the students and teachers in the implementation of the strategies and plans that have been set out to accomplish the vision and the mission statement.

The Deputy Head talked about the school vision being distinctive and how their adoption of it made the big differences in the school improvements.

**Deputy Head 4:** Thank God the effect has touched the spirits especially in the past 3 years. If you visit the school now you can notice big differences which are due to our adoption of this vision and mission. The school vision has now become quite distinctive, which is also mentioned in the school’s logo and in all its publications.

The SAL talked about the school being preferred over private schools in the city and the attempts to transfer to Elementary School No 1. He considered that the school vision is responsible for this preference.

**SAL 2:** The vision has made the people of this area and other districts choose this school and try to find a way to register their children, which is one fact, the other fact is that students from private schools are attempting to be transferred to our school. It is not only a school but a way of building characters too.

The Student Guidance Tutor mentioned that after instructional sessions to explain the meaning of the vision, besides repeating the vision every morning, the school vision has changed most of the students’ behaviour and improved them.

**SGT 2:** This phrase has greatly helped and I do hope it is taken seriously by the student which can result in positive attitude. I often repeat this phrase with the students at the morning lines and after prayers so that it can be understood by the student. The behaviour of some students has changed about 360 degrees after having attended simple instructional sessions to explain the meaning of the vision and how it can be achieved. Their behaviour has changed greatly although some students have not been affected except after many sessions.

The Head Teacher talked about the teachers' reaction in respect of the school vision and mission statement, mentioning that they utilised their efforts and abilities in various school activities.

**Head Teacher 3:** Yes, we –the school management- as well as the teachers have started resuming improvement of their process in accomplishing creativity. Even individuals that had no participation started, in the last two years, joining their other fellow teachers especially from outside the school. Some of the teachers, who had a background for computers or the scientific subjects, started utilising their abilities, interests and efforts in respect of methods for preparing classes and whatever serves the school in the various activities in order to fulfil this vision and the mission statement.

Most of the interviewees' feedback about conducting the school strategic planning and choosing their own vision in the school was very optimistic and positive. They were proud about the school vision, because they experienced several constructive changes in their students' and teachers' behaviours, activities and outcomes. Nevertheless, they mentioned

also that these encouraging results did not come right away, but they needed time and lots of efforts to be achieved.

### **Limitations of Strategic Planning in schools**

This subject is to enlighten us about the main question of the study which concerns the difficulties and the barriers of school strategic planning. Their responses to the questions were concentrated on the authority that should be given to the school managements which would allow them to facilitate and achieve their goals and objectives. Another important issue that was brought in concerned their reservations about financing the activities that needed extra budget and resources. The change resistance factor was mentioned in the interviewees' responses, however they all agreed that school strategic planning was very important and useful to the development of the school. Moreover, they all agreed that the head teacher's part in the process is very crucial in keeping the enthusiastic feeling and energising the school staff towards achieving the school vision and accomplishing the school mission statement. The first question in this area was:

**Ahmad Makhdoom:** The vision and the mission statement have been there for three years, so surely there must have been new teachers and administrators who had come from outside the school, how has their attitude and integration been in fulfilling the school's vision?

**Head Teacher 3:** At first it was a difficult task to accomplish, but when they attended the mutual visits between the teachers, which have been taking place, and after the idea started being a reality, the teachers started enjoying the class during the strategic planning. Now, thank God, strategic planning has started being

implemented in classes One to Six. Some of the teachers carry out training courses in strategies, which sometime reach six teaching strategies.

In his answer, the Head Teacher was relating to the teaching strategies programme which they began this year to improve the teachers' performance. Then there was the direct question about the problems involved in school strategic planning.

**Ahmad Makhdoom:** What are the problems that you faced in implementing strategic planning?

**Head Teacher 3:** At first the idea was new to the teachers and they were working according to previous programmes and experience which might differ to what is being required of them. However, the exchange of expertise between the teachers and the existence of modern methods and a lot of sources helped them to adapt and accomplish progress and creativity. Proper adaptation of the required strategies helps in fulfilling the vision and mission statement.

The same stages were described: difficulties in the beginning, then the adjusting stage followed by the proper adaptation of the process towards fulfilling the school vision and mission. The SGT mentioned the change resistance figures in the school, and how the head teacher's part was important to achieve these developments.

**SGT 2:** Yes. Basically there is no work that does not have disadvantages, the most important of which is the work team. Some of the new teachers who are not convinced with the idea, in addition to a certain category of teachers, whether new or old who are not convinced and do not want to do any additional work. When a teacher is not convinced, he would not care about the subject or participate. But

after sessions with these teachers, plus watching their fellow teachers work and the mutual visits, things are good now.

The Deputy Head talked about the contradicting instructions from the Ministry of Education or the Educational District that could sometimes delay the process, and that could be considered as a great obstacle which created a problem for the implementation of strategic planning.

**Deputy Head 4:** Like we mentioned before, it is planning for future stages, but sometimes we receive instructions from the Educational District such as written quarterly plans which we have to implement and produce modules.

The Head Teacher's concern was about some teachers who were opposed to the process of strategic planning or any new programme. Nonetheless, he described how he dealt with them with wisdom and patience besides conducting several meetings.

**Head Teacher 3:** The only obstacle is the existence of some teachers who are not keen on implementing these procedures and strategies. There is even a group of opposition to the efforts of the majority who are trying to cancel this idea basically, but eventually and after the group and individual meetings and interviews where discussions and clarifications took place, the implementation process is being carried out properly and much smoother especially after recognising the positive results for the Students and teachers.

### **The adoption of school strategic planning in Saudi Arabian schools**

Asking this question in the interview was to get more reaction on their opinions about the

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barriers to implementing school strategic planning in Saudi Arabia in general.

**Ahmad Makhmood:** In your opinion, why is strategic planning not implemented or spread in the Kingdom of Saudi Arabia whereas it is in the Emirates, Bahrain and other countries?

The answers reveal their need for knowledge about the new notion and the lack of attention from the higher management at the Ministry of Education or the Educational District, who might have provided information or instructed them to adopt strategic planning. The Head Teacher mentioned the researcher's book and workshop about strategic planning five years before. In addition, he talked about the lack of communication between schools which prevented them from exchanging their experiences with each other.

**Head Teacher 3:** We did not get to know strategic planning except through the book of Ahmad Makhdoom on the subject. When I read the book and attended a course with you, I was convinced by it and started implementing the plan in the school. Another reason is the lack of communication between the schools during the academic year, as well as the lack of visits or circulars from the Ministry, in addition to non-attendance of the teachers at training courses during the year.

**SGT 2:** Because it is a new subject to the Kingdom and also because of lack of courses, accomplishment, awareness or knowledge of it as well as non-obligation of the Higher Administration.

The SGT asked for more training sessions for the school about this new subject to them, in addition to their need for higher management orders to implement such process in the schools.

### **Luxury or necessity?**

The next answers showed that their opinions supported conducting school strategic planning in every school because it was not a luxury activity, but was a necessity for any school that desired real improvements and outstanding outcomes.

**Ahmad Makhdoom:** Do you think that each school needs strategic planning? Is it a matter of need or luxury?

**Head Teacher 3:** Strategic planning is not a way of luxury but it is a nice and good method to manage the school and the educational process, but it needs a specialised person who can work as a facilitator of the planning process. In addition it needs the provision of abilities that are needed by the school and the contentment of school management and teachers to carry out the process as well as accepting the idea. Whether the school is large or small, in government building or in rented building, does not prevent the implementation of school strategic planning. The main thing is the obligation and adaptation of the administration and teaching committee to the idea.

Although the Head Teacher was in agreement with the need for implementing school strategic planning in any school, however he emphasised the presence of a specialised facilitator to help the school conduct the process, beside the presence of a convinced head teacher to carry out the process as well as accepting the idea and fighting for it. He thought if these factors were there nothing could stop the school from implementing the strategic planning project; neither the school size nor the school building type could be great impediments.

**SGT 2:** No, it is not a luxury because proper work that is based on foundations has to be carried out through strategic planning and future schedules, given the fact that the student remains at our school for six years so it is essential to have future planning because the categories of students differ and it is important to determine a field for each student with specific planning.

The role of the school's administration in the success of implementing the strategic planning process was explained in the next responses. The Student Guidance Tutor, in an individual interview, expressed his opinion giving the credit to the Head Teacher for supporting the project and keeping it alive.

**SGT 2:** The administration has the credit for arranging to join the reluctant individuals with the dynamic teacher's team; and if it was not for the efforts of the Head Teacher and his patience, all that you see could not have been achieved. Certainly, the Head Teacher, being convinced with the idea, was able to wisely defeat the urge for 'change resistance'.

The Head Teacher agreed with this idea and in addition he did not think of amending or changing the school's vision because he is content with the current one.

**Head Teacher 3:** There is no doubt that the leadership of the school is very important in the implementation process of strategic planning as well as to support the same if the Head Teacher is convinced of its importance. We now see that the vision is comprehensive and complete, but naturally we will reconsider it during the course of the year in order to receive any suggestions for addition, amendment or change.

In this school, the initiation came from the Head Teacher to begin the process in his school and he got the permission from the Educational District because he believed in it as a method to improve his performance and the school outcome.

## **Case Two: Middle School No. 1**

### **Boys – Government –City School – School Building**

#### ***School characterisation***

**School Stage:** *Intermediate*

School Head Teacher: *1*

School Deputies: *2*

Number of classes: *16*

Number of teachers: *37*

Number of students: *363*

Number of admin staff: *6*

**School location:** *Makkah.*

Building type: *Government*

Number of laboratories: *2*

Type of playground: *Excellent*

Is it a combined school with other stages? *No*

Is it governmental? *Yes*

Does the school have a strategic plan? *No*

Does the school have a vision? *No*

Does the school have a mission statement? *No*

What kind of plan does the school have? *One year plan*

Is it a Head Teacher's plan? *Yes*

Is it a school plan? *No*

Is the school under any educational experimental programme? *Yes*

Middle School No. 1 was a government school located in Makkah the Holy Capital, in a governmental school building, the same modern structure as Elementary School No. 1. Middle School No. 1 had one School Head Teacher and two School Deputies in addition to one Student Guidance Tutor, and one Student's Activities Leader. The school consisted of sixteen classes. In Grade Seven there were six classes, one of them was for special needs students with hearing difficulties. In Grade Eight there were five classes, one of them for special needs students with hearing difficulties. In Grade Nine there were five classes, and again one of them was for special needs students with hearing difficulties. There were thirty-seven teachers and more than three hundred and sixty students, in addition to six administration staff. There were two science laboratories in the school and one large resource department that consisted of one big library, thirty-five computers and internet stations, three smart boards, and three data show projectors. The school also had an excellent playground with football field, basketball and volleyball field.

Middle School No. 1 was a one educational stage governmental school. The Head Teacher had a one year plan for his day-to-day tasks and responsibilities. The plan contained the staff duties for the duration of the school year. The school was under three educational experimental programmes. The first one was the joint classes of hearing disabilities students. The second programme was the Outstanding Schools programme, the third one was the Teaching Strategies programme.

The school Head Teacher was considered to be one of the best educational leaders in the city. The school team was highly motivated by him to engage positively in the study. Different groups of teachers in his school, in addition to external stakeholders, attended to participate in developing the school vision and mission statement. The co-operative school teamwork was able to finish developing the MSPM throughout three weeks of hard-working meetings and brainstorming sessions. They met more than three hours a day in fifteen working days.

The timing of developing the MSPM was not the ideal time, however they managed to succeed in allocating the time needed and making several changes in their schedules to attend the workshop and the sessions during the school days. The Head Teacher provided the team with every necessary equipment, encouragement, food, substitute teachers, and support to participate in the school strategic planning project. In addition, he was with them step by step despite his responsibilities. Almost all the teachers in the school participated in the project with a very organised agenda. The optimistic teachers participated in stating the strengths and the opportunities in the school, while the pessimistic teachers were involved in declaring the weaknesses and the threats in the brainstorming sessions. The process of developing the school strategic plan was completed, and everyone was happy about the results.

The Head Teacher's part in selecting and co-ordinating the teamwork was very important. He knew every one of them; therefore he chose the right group for the right part of the project with the help of the facilitator. The groups were asked to develop and suggest the school vision during the workshop. Every group prepared their vision and tried to protect their ideas from being changed or eliminated. The facilitator gave them some time to

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debate, and then he took their votes to select the keywords from each suggested vision. There were about twenty selected words. Another voting process took place to minimise the possibilities, until they reach five intensive keywords. At the end of the session the vision statement was developed by connecting these keywords. Everyone believed that this final vision was his own vision, they contributed in this constructive process and they were glad. The same techniques were used in developing the school mission statement and the school values. The feedback of this voting process was very encouraging since it was their first time taking a democratic decision based on voting in any school matter.

### ***Interview analysis***

#### **Initial interview**

The initial interview with the Middle School No. 1 team was held as a group interview in the Head Teacher's office.

#### **Type of planning**

**Ahmad Makhdoom:** what type of school planning do you have in your school, is it short-term planning (daily - weekly), medium-term planning (quarterly - annually), or is it long-term planning (three to five years) or maybe more than five years?

The Head Teacher mentioned several kinds of school planning, but school strategic planning was not one of them. He was very excited about participating in the study, since he was one of the hundred head teachers that had been involved in the author's School Strategic Planning Workshop five years before.

**Head Teacher 2:** We are very happy to contribute to your study. In fact it is weekly, monthly and or quarterly documented planning. However, the daily planning is not documented and is being practised routinely as part of assessment.

The Deputy Head Teacher (Deputy Head 2) answered the question in the same way, stating that he did not have his own separate plan but it was a part of the Head Teacher's plan.

**Deputy Head 2:** It is from the same plan of the Head Teacher. After he has distributed the tasks between the deputies and the staff, everyone agrees to operate according to the general plan. Of course we have weekly, monthly, and quarterly tasks and responsibilities and these are included under the general plan of the Head Teacher.

The SGT said that he had his own plan which concerned his work on students' guidance.

**SGT 1:** Yes, we plan our activities and programmes annually, and these include advertising, cultural awareness programmes, problem-solving programmes and preventive guidance programmes.

The Student Activities Leader pointed out that his plan was not part of the Head Teacher's plan, but that he was working according to the same plan that every middle school activity leader in Makkah had, with not many opportunities for change. In addition, he mentioned that he usually receives these fixed plan instructions from the Educational District by different methods of communication.

**SAL 3:** Yes, it is the same plan that everyone has. We have a unified and almost

identical plan for all the existing programmes in all middle-schools in Makkah with a chance of further work for possible extra activities. We regularly receive it by various means of communication, mail, email, or telephone.

### **Experiences in strategic planning**

In order to find the interviewees' level of experience, the researcher asked the group these questions: "Did you hear anything about strategic planning? Have you read a book or attended a workshop or do you know anything about school strategic planning?" Most of their answers revealed that they did not have enough information about the subject, but they tried to give different definitions about strategic planning. Some of their definitions were far from the known meaning of the notion which proved the fact that they knew very little about school strategic planning.

**SAL 3:** I heard about the name only, but did not attend any session or workshop.

The Deputy and the Student Guidance Tutor did not answer the question directly, and instead they tried to give their understanding of the strategic planning process. While they tried to give some description of strategic planning, they had clearly not experienced any strategic planning before.

### **Meaning of Strategic Planning**

When the interviewer rephrased the question and asked about the meaning of strategy, the Head Teacher explained that they do not have enough information about it.

**Head Teacher 2:** We do not have enough background about the word. But I think the concept in general means something important, strategic means good ideas,

maybe some type of distinction, or special mechanism.

**Deputy Head 2:** I think the specific strategy is how to move in the direction of or to achieve a certain objective. Or what are the strategic ways to teach any particular subject that you seek to teach.

**SGT 1:** Strategic Planning is how to develop a strategic plan that is designated in the light of our aims that we are going to achieve, but it needs a long period of time.

### **The need for school strategic planning**

The next question was about if the school needed strategic planning or everything was fine, thank God, and they were doing well. The Head Teacher revealed that the school needed it in order to upgrade its achievements and outcomes.

**Head Teacher 2:** No; on the contrary, everyone aspires to the best and try to upgrade his achievements, and I think strategic planning is useful work for any school.

Positive changes and new improvements were expected, from most of the team's encouraging answers to the question. The question was to assess the school's ability to participate in the study and the willingness to attend the workshop on school strategic planning.

**SGT 1:** I think it will mean a lot of positive changes, and I think it will work.

**SAL 3:** I think it will add something new to our work.

## **Limitations of Strategic Planning in schools**

The lack of time, the authorities' permission needed to conduct a strategic plan, the executive status of the school, the educational system policy and their huge tasks and responsibilities - these were the obstacles, in the opinion of the Deputy Head Teacher. He was afraid that they would not be able to change anything fundamentally. Furthermore, he thought they did not have the right to implement their own strategic plan separate from the Ministry of Education and the Educational District.

**Deputy Head 2:** I think we will not be able to implement all our plans, because we are an executive administrative unit. The executive functions that are required from us, will give us no time to work out our own special strategic plan. Even if we have our own special school strategic plan, our educational system possibly will not give us the power to create such a plan. Furthermore I do not think that we have the sufficient time for this kind of work in addition to the implementation of our tasks and our fundamental responsibilities.

A very healthy debate took place between an enthusiastic Head Teacher and his uncertain Deputy. The Head Teacher was defending the idea strongly and explained how they could overcome any barrier, mentioning that if they could not reach everything they wanted, they must not leave everything. In fact the discussion, and especially the Head Teacher's answers, were very helpful in the other interviews in different schools. He was asked whether there were very real problems.

**Head Teacher 2:** No; not at all; if we were confident about the idea, and we expect good results from implementing strategic planning, we can operate and

overcome any problem despite the obstacles or any conditions. Nothing will get in our way, if it is for the benefit of the school and the Students. As SGT 1 said there will be good results and it will work. Maybe we will use its ideas and concepts in our normal lives. As they say; “If we can’t achieve it all, we mustn’t leave it all”.

**Deputy Head 2:** That is correct, but I am talking about the educational process; I say how can we make a strategic plan outside the scope of Educational District and the Ministry of Education? Do we have this right?

The Head Teacher’s knowledge and enthusiasm about strategic planning made him very eager to try the process in his school and to motivate the rest of the school team to take a co-operative stand toward its success. His idea of accepting the project in his school was to use the strategic thinking to accomplish their tasks. That was the proper way to implement their duties and responsibilities and to reach the good quality they needed.

**Head Teacher 2:** It is a strategic plan for our school, that is consistent with the Policy of Education in the Kingdom of Saudi Arabia. However, as an executive management we can not contradict the Ministry’s aims and general goals. Nevertheless, we could strategically plan for a good way of proper implementation of our executive responsibilities.

The Deputy gave actual examples of the lack of power at the school level to change anything essentially, and the difficulty they might face if they attempted to change it.

**Deputy Head 2:** But we still can’t change everything or anything fundamentally, and you will meet with many obstacles which prevent you from implementing what you want on the ground. For example, can we increase the share of physical

education lessons in Grade Seven of our school, so they will have two hours as a replacement of one hour a week? I think it will be very difficult for us to do so. Moreover, do we have the right to ask for employing more teachers to meet this change?

The Head Teacher's reply was based on three points: first, they should not go too far from their capabilities as an important description of good planning; second, they should put in mind several alternatives for their actions; and third, they should report any major change to the Educational District to seek agreement and support.

**Head Teacher 2:** Good planning should not exceed beyond its actual authorities, there are possibilities and capabilities. A good strategic plan always looks and search for alternatives that are commensurate with what is already available. I think if we present our plan to the officials and ask for additional requirements, we will see the possibility of providing us with what we need. After all "If we can't achieve it all, we mustn't leave it all".

The Head Teacher's calm and smiles during the discussion gave the debate a friendly atmosphere and motivated the others to support the idea of conducting strategic planning in their school. The general feelings among them were optimistic and they thought at least they should try to make the most of it.

### **The adoption of school strategic planning in Saudi Arabian schools**

The question investigated why they thought school strategic planning was not applied in Saudi Arabia, while it is being applied in many developing nations such as Kuwait, UAE, Malaysia and Singapore, not to mention the U.S.A. and Canada; were there any specific

reasons for this? Their replies gave some indications of the barriers to school strategic planning. Most of their answers referred to the Ministry of Education's responsibilities and its centralised system. The teacher responsible for Student Guidance said: "Maybe the Ministry is not convinced by the idea." The Student Activities' Leader said: "Maybe they tested it somewhere that we did not hear about it, or perhaps the experiments were not successful." The School Deputy said: "Maybe because it is not presented to us until now." They all mentioned 'they,' referring to the Ministry of Education, but the Head Teacher had another good reason. He thought it was because the Ministry of Education was trying another programme which was similar to the OFSTED inspection procedures.

**Head Teacher 2:** I think because they applied an alternative programme for school improvement, which is the Comprehensive Evaluation School Programme. I suppose it is similar to the inspection process in Britain. The inspection has been experienced and implemented for more than three years in Saudi Arabia. They have tried many mechanisms and tactics, but all the committees were from the local education departments. I think the results would have been better, if it were independent commissions that have no relationship to the Ministry of Education, and we would have less biased evaluations. Furthermore, the improvement process stopped after the inspectors finish their visits.

The School Deputy's opinion about the centralisation system in the Ministry of Education was very clear in his reply, he thought it would be the main obstacle in applying the school strategic planning project.

**Deputy Head 2:** I believe the centralisation system, no doubt, is one of the most

important causes of the inability to apply school strategic planning because we must implement all the ideas that come from the Ministry. Any new ideas from us should be sent to the Ministry and approved by them; and we must wait for the circular from the Ministry or the order to begin any project.

Once again the Student Guidance Tutor repeated the need for training before the implementation of school strategic planning.

**SGT 1:** Could be because the concept of strategic planning is not clear to us, and there must be focused training until it can be applied well in our schools

It can be noticed from their responses that the votes of approval to conduct the school strategic planning process are more than the uncertain voices. At the end of this meeting, the interviewer thanked them for their participation, hoping that they would spend sufficient time to clarify and understand the concept of school strategic planning, and then they would have the chance to come to a decision as to whether or not the school would apply the process.

### **Middle School No. 1 Final Interview:**

The final interview meeting was held as a group interview after the workshop, and after completing the school strategic planning process using the MSPM. The interview was with the Head Teacher and some members of the school Strategic Planning Team. The interview discussed the importance of school strategic planning, and whether or not it was difficult to apply the MSPM in the school. Another main question was: “What are the

problems raised as a direct result of implementing the MSPM?”

### **Difficulties with the school Strategic Planning Model**

The purpose of this part of the interview is to find out the team’s opinion about the strategic planning process in general and the suggested model in particular. The researcher asked them first if it was difficult to apply the MSPM.

The Student Activities’ Leader believed that school strategic planning was not that difficult, not like they had expected. He added that “if we understand the concept, the model is applicable and it can be done.” The Head Teacher’s response was similar, when he stated that now it was not difficult and it was applicable with some time management.

**Head Teacher 2:** “God willing” it is not difficult; on the contrary it is easy to apply with some time-management; it is not difficult. Certainly we can apply it within the school, with the help of involving teachers and key school stakeholders.

Then this researcher asked them for their reflections on implementing the suggested school Strategic Planning Model that they had trained to use. They all agreed that it was not complicated, but they asked for more training, while some of them preferred the presence of a qualified person as a facilitator during the planning project.

**SGT 1:** In my opinion, it is clear.

**Head Teacher 2:** It is clear and easy but after training

**Deputy Head 2:** Yes, there should be enough training or the presence of a qualified person to explain how to implement the steps.

**SGT 1:** Sufficient for most people

**Head Teacher 2:** I believe the training period was sufficient and the model is easy and applicable. However, if any other school wants to apply the MSPM it must have their coach or facilitator to explain some things to them.

When they were asked about the school Strategic Planning Model's steps, if they needed any more clarification or explanations, they thought that the steps were clear apart from SWOT analysis. Most of them did not differentiate between the strengths and opportunities, since these were positive points inside or outside the school. Likewise a lot of them found it difficult to tell the difference between the weaknesses and the threats, since they were negative points in the school atmosphere.

**Head Teacher 2** Initially some people were afraid or not interested, but after the training, we found the steps were not difficult and logically sequenced. In addition in the stage of SWOT Analysis we must emphasise and explain the difference between the strengths and opportunities, because they all are positive sides in the analyses; as well as the difference between the weaknesses and threats, because they all are negative sides.

### **Order of implementing Strategic Planning**

The order of implementing the process of school strategic planning in the Ministry of Education was one of the argumentative issues in this meeting. Should the Ministry of Education begin by setting out its vision and disseminating it to the public? Or should the schools start the project? The Head Teacher thought that the project should start from the Ministry of Education then spread to the schools.

**Head Teacher 2:** The Ministry must have a vision and strategy and then the Educational District would create its vision from the Ministry's vision. Likewise, the Supervision Centre should seek its vision and mission from the district. At last every school makes their vision and mission statement from all of the above.

In this way the process will be produced with a sense of coordination and constancy. The progress will continue even if one of the team numbers leaves the school. I believe this is the way it should be. This is the institutional way. Unlike the other way in which the individual work is covering all over all thoughts and activities. I am pointing at the Supervision Centre because it is the one that is directly responsible for schools' supervision.

**Deputy Head 2:** But the South Supervision Centre has a vision and a mission statement for the next three years, which stems from the vision of the new General Director of Education. It is placed at the Centre's gate.

The Head Teacher's idea of the strategic vision was that it should be done with the awareness and the contribution of the stakeholders.

**Head Teacher 2:** However, the concept of Strategic Planning and its implementation should be participatory. At least all parties interested in your business should see your vision. Therefore, it should be distributed and made sure it reaches all the interested parties in the process. The Centre did not bring out this vision to us, and inform us about our part in achieving the vision. In my understanding the main duty of the Centre is to facilitate the achievement of its vision by spreading it to every school. Strategic Planning is not only to be in the

head of the centre's director, or just to put the vision outside of the office, this is not a logo. Slogans or logos are different from strategic vision.

The important issue here was how they could recognise a vision if they saw it, in addition to the knowledge of how a vision should be developed. Another important matter was discussed by the teacher responsible for student guidance, that the different visions must not contradict with one another. All school visions should contribute to the general educational policy of the Kingdom of Saudi Arabia.

**SGT 1:** I wonder if every person has his individual vision; school's visions; centre's vision; Department of Education's vision and the Ministry of Education must have a vision. One can think that all these visions will be conflicting, or at least contradicting. I think all these visions must move in the direction of achieving the General Educational Policy in the Kingdom of Saudi Arabia.

The Student Activities' Leader and the Deputy had the same opinion about the Educational Policy which should be in front of everyone in the Ministry of Education.

**SAL 3:** I think the General Educational Policy in the Kingdom of Saudi Arabia is the big umbrella; therefore every part in the system should know it, understand it, and put it in front of him; therefore there will be no contradictions or conflicts.

The Deputy again clarified his point of view of the sequence of strategic planning order from the Ministry to the schools in order to prevent any kind of inconsistency between the Ministry's departments.

**Deputy Head 2:** Yes, to begin with, the Ministry of Education should publish its

vision, and after that it will be possible for the various departments or districts to create their strategic plan that is compatible with their potentials and different capabilities. In the end, schools or head teachers can forward their plans and vision that are not inconsistent with the Ministry's aims.

Although the Head Teacher agreed to this sequence, he thought that the school head teacher should take the initiative step toward any good ideas that he might find in his field and report it to the higher management level.

**Head Teacher 2:** Indeed, that is how it should be. In addition, the Ministry of Education should make every effort to train the personnel in the field (districts and schools) to do this kind of planning. Nevertheless, as a school head teacher, from my point of view, if I saw an appropriate method for the planning process, I would try it. Then I can report it to the Department, District or the Ministry for approval. This is in my view an initiative procedure, that can be categorised as search for quality and excellence.

In their opinion, the appropriate order to conduct the school Strategic Planning process was to begin from the Ministry of Education, then it should move to the departments, then to the educational centres and finally to schools. Some of them thought that it was possible that the opposite could happen when the schools began the development and created their visions and plans, and then the process could move to the Departments and the Ministry. Nevertheless, the Deputy insisted that the process should begin from the top of the pyramid.

**Deputy Head 2:** Practically and realistically, the story should start from the top of

the pyramid and then down to the field, I mean the schools. In order not to get to the stage of rejection or incompatibility and disapproval, it should be this way.

The Student Guidance Tutor and the Student Activities' Leader were in agreement with the Deputy, because that was the usual order of the system.

**SGT 1:** I think the instructions and regulations should come from the Ministry of Education; then to the educational district; after that to the supervision centre finally to the schools.

**SAL 3:** I agree with SGT 1, we are used to the system this way.

The Head Teacher defended his idea of the school initiating the planning, mentioning that the educational policy is well known, besides the school leader should look for school improvement and excellence and try to achieve it.

**Head Teacher 2:** But schools have the Saudi Arabian Educational Policy, it is clear, written and scattered everywhere. In addition the Ministry's goals are well-known and we can visit the website of the Ministry to see them. Therefore, the schools can build their visions and mission statements according to that. As a result no conflicts will occur with the objectives of the Ministry and the Education Policy in the Kingdom. Everyone wants excellence and initiative procedures can examine and look for all that make his work and ideas easy.

The Deputy thought in this way all the school visions would be alike.

**Deputy Head 2:** But then all the elementary schools' visions will become alike. All the middle schools' missions will be similar; and all secondary schools would

be the same; so why would we waste time and effort?

The Head Teacher assured the need for individual vision to each school, turning the attention to the diversity of different schools and the uniqueness of their circumstances,

**Head Teacher 2:** On the contrary, then each school will feel their independence. Each school can manufacture its vision that can achieve its goals according to its potential and circumstances. You know that the elementary schools are different from the middle and different from secondary schools. Moreover, the city schools are differing from the ones in the villages. Furthermore, the schools in the same city are differing from one another and from one place to another, different from one neighbourhood to another. Different schools have different conditions, potentials, strengths and weaknesses. So, every school will try to focus its efforts on excellence or address weaknesses and exploit opportunities.

### **Benefits of strategic planning**

The researcher then moved the dialogue to the importance of school strategic planning. The Team considered that strategic planning made the work more organised, concentrated the effort towards the school's needs and directed the entire school atmosphere towards the school mission.

**Head Teacher 2:** In my opinion, that is of great importance; for example, school strategic planning helped the school to perform its work in a clear and organised way. But we must provide the schools with all the qualifications and possibilities they need to implement this kind of planning and practice and make it reality. School strategic planning can put your hand in everything that could be found

inside the school and helps you to work realistic analysis inside and outside school from the people how knew every part in the same school. Additionally, school strategic planning helps the team to create the schools goals and objectives. The participations in this project will make everyone aware of the school vision, mission statement, or at least have the accurate information and knowledge about the school intentions.

The sharing and making contributions to the decision-making process was also one of the benefits of school strategic planning.

**SAL 3:** I think the sharing and the group participation part was very helpful and motivating. In reality as a team we contribute to the process of decision-making.

Some of them were afraid of the lack of resources and support. Their concerns were about the availability of the strategic planning requirements.

**SGT 1:** But where do these possibilities and strategic planning requirements come from? Can we have it when we need it?

The Deputy again raised the subject of support from the officials, which moved us to the barriers and limitations of strategic planning.

**Deputy Head 2:** This is one of our many fears and concerns; when we plan for something and you do not find the moral or financial support from officials.

### **Limitations of Strategic Planning in schools**

The question was: “What are the expected problems or the obstacles in implementing school strategic planning?” The Deputy Head Teacher talked about the explanation before

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the problem, mentioning that spreading the strategic thinking culture might overcome most of the support and approval difficulties.

**Deputy Head 2:** I think the most important thing in school strategic planning is that the people who are going to be responsible for the process should take courses or workshops in school strategic planning. As a result, they can master this skill; otherwise, how can they create the vision, mission, and make the right analysis without this knowledge. We are missing the awareness and the culture in this subject. In addition, the approval of the Administration and the Ministry on our goals and the entire planning project is highly important.

The Head Teacher also talked about the expansion of strategic thinking as a matter of decreasing the impediments to implementing school strategic planning.

**Head Teacher 2:** Strategic thinking and the way that community should think on school issues and topics of interest must be spread among all those interested and the people involved in the educational process. So that everyone feels the same ground. You can not involve individuals in the subject, if they do not believe in the idea. If people are accustomed to conducting work on day to day nature, and they did not realise thinking about future; you will find stiff resistance and you will need extra time and effort to emerge your thoughts; and to motivate them to contribute effectively in the process of successful application of school strategic planning.

The Student Activities' Leader mentioned change resistance as one of the major barriers to the strategic planning process.

**SAL 3:** I think change resistance is a big issue in school strategic planning. We are

making a strategic plan to improve our school; the development process means changing materials, regulations, people, and our way of doing things; so we will face several kinds of challenges.

The Deputy Head Teacher pointed out that the current daily work pressure and the huge amount of tasks could prevent the school from conducting any new ideas.

**Deputy Head 2:** Other than the lack of school potential and capability, getting the approval from the authorities, and change resistance; there are additional important things, which are: the daily work pressure, the enormous numbers of tasks, and external educational participations to be undertaken by the staff. I think strategic planning needs offloading and time to develop the plan, and then requires considerable understanding and cooperation in terms of both subscribers inside and outside school and hard work to carry out the actions required for achieving the goals.

Both the Head Teacher and his Deputy agreed that the misapprehension and lack of collaboration of the district officials is another impediment to the implementation of the suggested school Strategic Planning Model.

**Head Teacher 2:** Yes, in fact, the pressure of work at the school reduces the presence of time we need to create the plan. The plan needs clarity of mind; in addition the co-operation of the Ministry and administration is very important. Excuse me, but some officials at the Centre or the District do not co-operate with us and cause more pressure. For example, class numbers, while we are looking for at most 25 to 30 students in each classroom, we find continuing requests from

officials or supervisors to increase the student numbers in each class to 40 or sometimes more. Everyone knows that this may reduce the chances of student - teacher interactions and the school's good performance and quality of its outcomes.

**Deputy Head 2:** Moreover, sometimes some officials have haphazard decision-making that may pose the process to confront change, and do not forget the hidden resistance phenomenon, and this may be inside or outside the school. These factors should be considered seriously in order to make a good plan.

Nonetheless, the Head Teacher said, we have to put those factors as threats, weaknesses, or risks while making the plan in order to overcome them and achieve the school goals.

**Head Teacher 2:** A successful educational leader should calculate these risks and take all the possible quality actions that will have good impact on achieving his objectives.

The Head Teacher and the Team agreed that they did not expect there would be problems from the students' parents or the students in the application of the strategic plan. Most of them answered that they did not think that there would be any problems from the students or their guardians. However, in the matter of taking the approval from the authorities if it would be an obstacle to start implementing school strategic planning, the Head Teacher was willing that there should not be any difficulties.

**Head Teacher 2:** God willing, there will be no problem. If you set your goals, objectives, and targets carefully with the intention of not contradicting the Educational Policy, I'm very sure there will be no problem.

## **The effect of school strategic planning**

The discussion then turned to the positive effects of the school strategic planning, and the Head Teacher agreed with the view that strategic planning reduces the uncertainty and risks in arranging school activities.

**Head Teacher 2:** Yes, I agree largely with this view, especially for team work and thus their task is to convey this idea to everyone who participates in the school work.

The Deputy Head Teacher was of the same opinion that strategic planning reduced the hesitation in performing school activities.

**Deputy Head 2:** Yes to a large extent; because everyone has participated in the discussion of each of these conditions and we chose the proper procedures to ensure we are facing. Although there will remain weak possibilities, for something may appear in the future.

The Head Teacher was definite that strategic planning could take advantage of the opportunities that might exist in the school environment.

**Head Teacher 2:** Because it is group thinking and it is teamwork; it is not a decision of only one person. The whole team have worked together as a group and discussed all the matters that concern the school.

Although some of the Team members were certain about the idea, they asked for the appropriate time during the process to study all the possibilities.

**Deputy Head 2:** Yes, and the important issue is you should have enough time to

study these opportunities during the planning process.

To take the conversation further, this question was asked: “To what extent can school strategic planning contribute to the unification of the school efforts?” They expected that strategic planning would make the school environment work along the same line, as long as they tried to achieve the same objectives.

**Head Teacher 2:** After the commencement of the implementation, the task of the school management is to follow up the implementation of all procedures and make sure that everybody is working and trying to achieve the same vision and to accomplish the mission statement. Therefore, as long as they are trying to achieve the same vision they will be unified and working along the same lines.

Some of the Team proposed combining the in-school planning with stakeholder participation and the clarification of the vision. Therefore, if everyone participated in creating the clear vision, they expected strong unification.

**Deputy Head 2:** If the vision and mission statement were agreed upon and manufactured at the school, why not, everyone will work together for their achievement and commitment to the vision.

Finally, this researcher thanked the team for their time and contributions to his study hoping they would be able to achieve their goals and objectives successfully.

## Case Three: Secondary School No. 1

### Boys – Government – City School – School Building

#### *School characterisation*

**School Stage:** *Secondary*

School Head Teacher: *1*

School Deputies: *3*

Number of classes: *21*

Number of teachers: *46*

Number of students: *657*

Number of admin staff: *9*

**School location:** *Makkah*

Building type: *government*

Number of laboratories: *3*

Type of playground: *excellent*

Is it a combined school with other stages? *No*

Is it governmental? *Yes*

Does the school have a strategic plan? *No*

Does the school have a vision? *No*

Does the school have a mission statement? *No*

What kind of plan does the school have? *One year plan*

Is it a head teacher's plan? *Yes*

Is it a school plan? *No*

Is the school under any educational experimental programme? *Yes*

Secondary School No. 1 was a government school that is located in Makkah the Holy Capital, in a governmental modern structure school building. Secondary School No. 1 had one Head Teacher and three Deputies in addition to two Student Guidance Tutors, and one Students' Activities Leader. The school consisted of twenty-one classes and the students were from sixteen years old and above. The school was supposed to teach students for Grades Ten, Eleven, and Twelve. However, because it was a Secondary Developed Curriculum School, it depended on specific credited hours for each subject. The Students could choose the teacher, the subject each semester and the desired credit hours. There were forty-six teachers in addition to six administration staff, and six hundred and fifty-five students. There were three science laboratories in the school, two computer rooms and one large resource department that consisted of one big library, thirty five computers and internet stations, three smart boards, and three data show projectors. The school also had excellent playground areas with football field, basketball and volleyball field.

Secondary School No. 1 was a one educational stage governmental school. The school was under three educational experimental programmes: the Secondary Developed Curriculum, the Outstanding Schools Programme and the Teaching Strategies Programme.

Although the school Head Teacher was considered to be one of the best educational high school leaders in the city, the school was in a hesitant situation. When the researcher arrived at the school, the Head Teacher was newly appointed to the school and was at the beginning of his third week. He had no experience of such school programmes. He was used to working in classic secondary schools; however, he was excited to participate in the

study since he thought that it would be a good opportunity to know the school better through the analysis, in order to start with this big change in his career.

The timing of developing the school Strategic Planning Model in this school was therefore an awkward time: a new Head Teacher who had very little information about the school and the teachers, who was getting used to a new sort of school schedule, a new high school programme and a new environment. Therefore, the Head Teacher selected one of the Deputies and the teachers from different specialties that would have the same time available every day to meet for about two hours and a half as the Strategic Planning Team. However, we agreed to conduct several interviews with the other staff or the students when they were available, in order to gather the information the study needed for the project. This researcher managed to conduct all the interviews that were needed before the workshop and to meet with the selected Team for three weeks. After each step in the MSPM, the Strategic Planning Team managed to make the necessary communication with different stakeholders to participate in the process in order to move to the next step. The Team made very good efforts to make almost everyone aware of the project.

The Head Teacher provided the team with every necessary equipment, encouragement, refreshments, and support to participate in the school Strategic Planning project. Almost all the teachers in the school participated in one way or another in the project. After the process of developing the school strategic plan was completed, everyone was satisfied about the results.

## ***Interview analysis***

### **Initial interview:**

The initial interview with the Secondary School No. 1 Team was held as an individual interview for each participant in different places at the school premises.

### **Type of planning**

**Ahmad Makhdoom:** what type of school planning do you have in your school, is it short-term planning (daily - weekly), medium-term planning (quarterly - annual), or is it long-term planning (three to five years) or maybe more than five years?

The Head Teacher had not formed his personal plan yet, since he was recently appointed to this new position. He had decided to work with the current plan that the school had from the previous Head Teacher: this was a one year plan for the school employees' day-to-day tasks and responsibilities.

**Head Teacher 1:** I am proud to co-operate with you, while not having been appointed at the school for more than ten days, and I have looked at the previous plan and will be observing how work is getting on. Then I shall be setting out a plan to cover the remainder of the year without any major changes so that we preserve the core of the work then we could affect the changes gradually.

The First Deputy was responsible for student registration and had no written plan to direct his school work.

**Deputy Head 1:** My work is precisely registration and acceptance of students, that is, the student brings his file, gets registered for the first academic term or the

second, after which he has to work out his schedule by choosing the subjects and teachers as per the abilities of the school.

During his six years' experience, the Deputy Head had not used any written plan because he found the planning process was confusing. The researcher asked him this question: "During your work, have you not found that you might need to prepare a plan which you could benefit from, for a clearer and more organised accomplishment?"

**Deputy Head 1:** That could be the case, but our problem is that our plan is ordinary and is linked with the school's abilities. For example, if we set up a plan, that is to dedicate ten groups for every thirty students and when implementing the plan the group could be decreased to eight or more depending on circumstances of location and human resources, so we have to work according to the actual reality.

His response was not convincing enough for not using any quarterly, monthly or weekly plan during the years he worked at the school. There were not even some notes or scraps of paper to remind him of the work he needed to do. Moreover, he tried to explain the reason for not having a plan by the school's instability and changing circumstances.

**Deputy Head 1:** I do not have a written plan due to our circumstances. For example, today we have academic supervision at the fourth class and there is no plan. Why do we have academic supervision today? Because if our circumstances were stable we would not need academic supervision as we would carry out supervision if we find problems, like today. So it all depends on our circumstances. Because our current system has some difficulties, but if you set out a plan then you have to follow it accordingly and do not get confused.

The Second Deputy had a weekly and daily plan for his school tasks and duties. His plan was part of the previous Head Teacher's plan.

**Deputy Head 3:** Yes, there is a plan comprising my tasks within the school, such as supervision and the school morning lines. I have a daily plan and a weekly plan. The daily plan is the routine daily tasks and this was contained in the old system. As for the advanced system, it starts with the school lines then the follow up on students' absence and liaising with the Students' Instructor, as well as the follow up on the number of absent days and supervising the building. This is the daily plan.

The Third Deputy has monthly and yearly plans depending on the required work.

**Deputy Head 10:** We used to set out a plan in accordance with the work we had been entrusted with. There are monthly and yearly, it depends on the required work.

It can be noticed from their answers that they had an old plan from the previous Head Teacher, and they did not have any plan to develop a new one before the end of that semester.

### **Experiences in strategic planning**

The next part of the interview was to find out the interviewees' level of experience in strategic planning, and therefore these questions were asked: "Did you hear anything about strategic planning? Have you read a book or attended a workshop or learned anything about school strategic planning?" Their answers showed that they did not have adequate

information.

**Head Teacher 1:** I do not have enough information on strategic planning, neither do I have any previous readings or courses or anything alike.

**Deputy Head 1:** I have heard but not tried it.

**Deputy Head 3:** Some hints only, but I have never thought about it seriously.

**Deputy Head 10:** Yes I attended a course at the City of Jeddah in 1424 AH but unfortunately we were unable to get a complete strategic plan at the time as the course was limited to educational issues only and there was no strategic planning.

### **Meaning of Strategic Planning**

When they were asked about their opinion of the concept of school strategic planning and what does it mean to them, they tried to give different definitions of the subject. Some of their definitions were far from the known meaning of the notion, which proved that they knew very little or nothing about school strategic planning.

The Head Teacher tried to give a grammatical explanation to the term ‘strategic planning’ and linked it to achieving targets.

**Head Teacher 1:** If we try to explain it grammatically, then it is an attempt to put a plan for the accomplishment of tasks that are suitable for the school’s abilities and workforce, and through which implementation of great targets can be achieved.

The First Deputy, the one that had no written plans, thought it was important and planning for the future.

**Deputy Head 1:** It is planning for the future. It is important because any work without planning is not worthy or complete.

The Second Deputy assumed that it could help in reaching certain targets; in addition he talked about some differences between traditional planning and strategic planning.

**Deputy Head 3:** You put a plan which could benefit your work and you implement it in order to reach a certain target. Then when you reach your target you try to improve your plan to reach another target which could be beneficial to the future. Ordinary planning is the traditional routine whether it is successful or not. As for strategic planning, you are looking for negatives in order to avoid them, whereas you continue follow up the positives and try to revise them.

The Third Deputy believed that they are maybe the same, but strategic planning is for the distant future, from five to ten years ahead.

**Deputy Head 10:** The ordinary planning means targets that we wish to achieve, however strategic planning is for the distant future... It depends.... sometimes five other times ten years. Strategic means important or something that is programmed and studied, set out for a certain target.

### **The need for school strategic planning**

When they were asked if they would welcome attending a course if it was offered to them, in order to acquaint themselves further with the Strategic Planning process, most of them liked the idea. Despite the fact that the Head Teacher was content with the idea of attending a workshop on strategic planning, he mentioned that he would remain with the

traditional planning at least for that term.

**Head Teacher 1:** I would be honoured and would thank those who can participate in this. I would welcome this modern planning, but I would remain with the traditional plan for this term only due to the existence of new faces in respect of teachers, workforce and students. The second term will give an opportunity to get closely acquainted with the new situation.

The First Deputy recommended strategic planning for the school. Additionally, he mentioned that he would agree straight away to attend such course.

**Deputy Head 1:** Yes. There should be a strategic plan to cover and determine everything from the beginning of the term, but the plan sometimes become an obstacle if implemented in detail and there could be problems with the implementation process. No, I would not refuse, actually I would agree straight away.

When he was asked if the school needed strategic planning or if the ordinary planning was sufficient, the Second Deputy thought that the school was in a good situation, however he welcomed the proposal.

**Deputy Head 3:** The school is in a good position now, but we are always looking for something better so we would welcome the idea. No doubt, if there is any benefit then I will accept it.

The Third Deputy made an apology for not attending the course due to his circumstances; moreover he thought he should understand the subject before attending any workshop.

**Deputy Head 10:** If I understood the subject then I would attend but at present, and for certain circumstances, I cannot attend.

### **The adoption of school Strategic Planning in Saudi Arabian schools**

The question explored the reasons why school strategic planning is not practised in Saudi Arabia, while it is being applied in many developing nations such as Kuwait, UAE, Malaysia and Singapore, not to mention the U.S.A. and Canada; are there any specific reasons for this? The Head Teacher had no idea about the subject or the reasons. He supposed that even some supervisors in the school's district have no idea about strategic planning and why it has not been spread in the Kingdom.

**Head Teacher 1:** I have previously told you that I do not have a clear idea of strategic planning, and I have moved practically every year or two years to a better position in another school, and the same plan that I am working according to was noted in every location. I have not been provided with information on strategic planning. There are even some supervisors in the School's Administration who do not have any idea about strategic planning and why it has not been spread in the Kingdom.

The First Deputy assumed that those countries did not implement the plan one hundred percent; therefore why would we trouble ourselves by setting plans that we cannot implement accurately.

**Deputy Head 1:** Is it actually implemented or is it just theoretical in the countries you mentioned? Is it implemented 100% or are there some issues that suddenly appear without prior notice? Why do we then go through the trouble of setting a

plan that we cannot implement?

The Second Deputy thought that it was because of lack of awareness among the decision-makers at the Ministry and ignorance about the new notion.

**Deputy Head 3:** It is due to lack of courses or non-existence of individuals who are interested in arranging meetings with persons who are aware of strategic planning. It is also due to lack of administrative education or sufficient awareness by the people who are interested.

The Third Deputy guessed that the causes were lack of knowledge about the process, lack of interest, and/or lack of acceptance.

**Deputy Head 10:** The researches that are carried out in the Kingdom about this field are very few and there is no knowledge about the subject. The people who are in charge of such a subject might not be interested or flexible enough to accept any external ideas or opinions. The other obstacle, for example, is like if I have a project I would not accept any external idea beside my idea. Another obstacle is not having enough knowledge about the subject or how to implement the idea successfully.

Their replies gave some indications of the barriers to school strategic planning. Most of their answers referred to the Ministry of Education's responsibilities and its centralisation system.

Finally, this researcher thanked everyone for their time and participation.

### ***Secondary School No. 1 Final Interview:***

The final interview meeting was held as a group interview after the workshop, and after completing the MSPM process. The interview was with the Head Teacher, the Second Deputy, and an English teacher who was one of the school Strategic Planning Team. The interview discussed the importance of school strategic planning, and whether or not it was difficult to apply the suggested model in the school. Another main question was: “What are the problems raised as a direct result of implementing the suggested school Strategic Planning Model?”

### **Difficulties in the school Strategic Planning Model**

In this part, the interview was to find out the team’s attitudes about the strategic planning process in general and the MSPM in particular. This researcher asked them first if it was difficult to apply the MSPM. The Head Teacher thought it could be implemented inside the school, but only if they managed to find enough time. He was referring to the difficulties that we had had in selecting the Team and the suitable times to meet for the interviews and the workshop.

**Head Teacher 1:** With God’s will it should be easy, because it is not difficult and can be implemented inside the school after programming the right time. However the participation of the teachers and everyone is most important in the decision-making process.

The rest of the group had the same impression, and they thought that after the workshop it was not that difficult. Then the discussion moved on to find out their opinion about implementing the MSPM. The English teacher thought the model was easy, clear, and

understandable.

**Teacher 1:** The module is easily implemented and the good thing is that its steps are clear and understandable.

Then they were asked about the training period, whether or not it was in their opinion sufficient. The Second Deputy Head Teacher and the English teacher thought that there was enough time, but the Head Teacher suggested that the training session should be outside the school hours.

**Deputy Head 3:** More than 20 hours of training was sufficient and we had enough time to try all the steps practically.

**Head Teacher 1:** Yes, but I suggest that the training period should take place outside the school hours.

The interviewer asked them which steps needed further explanation or clarification. The answers were largely as expected, because the new terms were unfamiliar. Most of them did hear about vision, mission, strategy, and SWOT for the first time.

**Head Teacher 1:** At the beginning it needed explanation, but after the training we found the steps quite clear.

**Deputy Head 3:** It was somewhat difficult at the beginning, but after the explanation of the new terms such as vision, mission, strategy, and SWOT it became much easier.

## **Benefits of strategic planning**

The dialogue then moved on to the importance of school strategic planning. They believed that strategic planning helped in organising the work, made a practical school analysis, increased the school allegiance, and captured everything of the school's needs.

**Head Teacher 1:** It helps the school to perform in a clear and programmed manner, together with the existence of helping elements such as abilities and qualifications to carry out this planning. Also, strategic planning makes you aware of everything in the school, and gives you realistic school analysis from eight sides inside and outside the school by people from the school environment. Therefore the targets are made in the school, so everyone will be more loyal to achieve them. Strategic planning makes everyone in the team aware of the school's strengths, weaknesses, opportunities, and threats. This will mean their decision is built on scientific and realistic foundations.

The English Teacher talked about the good atmosphere that helped in fulfilling the school targets.

**Teacher 1:** It helps in forming an educational environment for the purpose of fulfilling a mutual target, while giving freedom of opinion to make a decision.

The Deputy Head Teacher reminded the group about the resources and the funds which were needed to achieve the strategic planning targets.

**Deputy Head 3:** But strategic planning needs resources and I am afraid that it will not be possible to provide these funds and requirements.

The Head Teacher's desire to reduce the apprehension of the school strategic planning process could be noticed in his answer to his deputy. He mentioned that all the procedures and school activities should not go further than the school's capability. Otherwise that could not be described as a successful strategic planning process.

**Head Teacher 1:** As we have learned, distinctive strategic planning does not extend beyond the abilities of the school and therefore the procedures need to be suitable with the ability of the school, otherwise the plan could be considered exaggerated or unrealistic.

### **Limitations of strategic planning in schools**

The group were asked about the problems they expected to occur whilst implementing strategic planning in their school or any other school; their answers touched several concerns. Organising the right time to suit everyone in the Team was one of the largest barriers to beginning the Strategic Planning Model in the school. The Head Teacher had no power to force anyone to come in outside the school hours. He had no authority or the budget to give them overtime money or orders. Therefore he had to co-ordinate between some of them and organise the school schedule to allow a teacher from each department to attend the workshop. From their point of view, the most important thing to be concerned about was getting funds for the needed activities; the other concern was related to change resistance. The English Teacher talked about the importance of funds as well as the school management's commitments to the school vision.

**Teacher 1:** We talked about the subject of funds, which is very important as it provides the methods and the general atmosphere within the school. In addition, the

school management's commitment and desire to achieve the vision are very crucial in this matter.

The Second Deputy Head Teacher spoke about the team commitments and the follow up procedures.

**Deputy Head 3:** Also the team commitment to follow up and implement the actions and activities in the plan is very important to reach the goals and objectives.

The Head Teacher mentioned that he had a strong belief that the school had the ability to resolve and overcome any obstacle.

**Head Teacher 1:** It is true that lack of abilities could prevent implementing plans but we should not leave the matter as a whole as we could implement part of it. Although I am new at the school, I can say that most of the obstacles can be avoided and resolved.

The Deputy mentioned some of the change resistance incidents that could happen at the school. However, the Head Teacher suggested some actions that could be taken to reduce the difficulties.

**Deputy Head 3:** But the Students' Guardians or some administrators do not cooperate with the school in respect of registration and accepting some of our procedures which could facilitate our work as everyone wants to render the least of efforts. Do not forget that there could be clear or unseen resistance to the changes.

**Head Teacher 1:** We can resolve all or most of the difficulties facing us if we set out a joint plan consisting of appropriate vision and mission statement, link it with

a suitable timetable and motivate everyone to insist and to be attached to our plan. I think that this opposition can be dissolved if meetings were held with teachers to seriously attempt following up on the process.

No one in this group expected any problems from the students or their guardians in the implementation of strategic planning. When they were asked about this matter, the Teacher said: "I do not think there would be any problems, and if there were then they could be minor." The Head Teacher thought that the teachers' efforts would take care of this problem if it happened.

**Head Teacher 1:** Hopefully with the efforts of the loyal teachers we can fulfil what we aim for.

**Ahmad Makhdoom:** Would having to obtain permission from the Educational District to conduct school strategic planning be considered an obstacle to implementing school strategic planning?

**Head Teacher 1:** I do not think so, but the issue needs some efforts to convince them with our aims and the extent of the importance in fulfilling the same at the suggested time.

### **The effect of school strategic planning**

The conversation then moved on to the effects of the school strategic planning project, the Head Teacher mentioned that the MSPM decreased the doubts and dangers in the performance of the school work, especially among those who participated in the project.

**Head Teacher 1:** Yes, I agree, especially the individuals who participated in the

strategic planning process whose tasks should be to transfer these thoughts to the rest of the participants at the school.

The Teacher also agreed because their participation in the decision-making process would create this confidence.

**Teacher 1:** Definitely yes, as long as we have participated in writing down all these thoughts relating to the school and joined in taking decisions.

The Deputy Head Teacher concentrated on the issue of follow up.

**Deputy Head 3:** I agree, but we should not forget the follow up process.

The Head Teacher mentioned also that school strategic planning could contribute to enlarging the benefits of the opportunities that could exist in the school framework.

**Head Teacher 1:** If there were enough meeting sessions that were managed well then it could result in many opportunities.

The Teacher too was sure that these sessions could benefit the school improvement.

**Teacher 1:** Indeed, participating in these sessions will give good results.

In addition, the group thought that school strategic planning could help in bringing the school environment together and might make the teachers work in co-operation.

**Head Teacher 1:** If we implement Strategic Planning we will find that everyone will support the school administration and the school goals.

The interviewer asked the Teacher to what extent could school strategic planning

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contribute to school unity.

**Teacher 1:** To a good degree of unity and understanding, because everyone was part of the process, everyone participated in creating the goals, and everyone would be aware of the circumstances.

The Second Deputy Head Teacher had the same belief, linking this result of unity to the school vision.

**Deputy Head 3:** I think that the existence of the vision that was achieved by everyone will fulfil reaching good targets.

At the end of the interview, the researcher's grateful thanks were given to the group for their co-operation and their time, with the hope that the school would benefit from the new project to achieve their desired improvements.

## Case Four: Elementary School No.2

Boys – Government – Village School – School Building

### *School characterisation*

**School Stage:** *Elementary*

School Head Teacher: *One*

School Deputies: *One*

Number of classes: *6*

Number of teachers: *15*

Number of students: *140*

Number of admin staff: *2*

**School location:** A village south of Makkah

Building type: *government*

Number of laboratories: *1*

Type of playground: *good*

Is it a combined school with other stages? *Yes*

Is it governmental? *Yes*

Does the school have a strategic plan? *No*

Does the school have a vision? *No*

Does the school have a mission statement? *No*

What kind of plan does the school have? *One year plan*

Is it a head teacher's plan? *Yes*

Is it a school plan? *No*

Is the school under any educational experimental programme? *No*

Elementary School No.2 was a government school that was located at the entrance of Al-Kor village south of Makkah the Holy Capital. This governmental school building contained the three educational stages in the same premises. The No. 2 schools were a combined school that had one School Head Teacher and three School Deputies in addition to one Student Guidance Tutor, and one Students' Activities Leader. The elementary school had one deputy and consisted of six classes: one class in every grade from One to Six. There were fifteen teachers for more than one hundred forty students, in addition to two administration staff. There was one science laboratory in the school and one resource room that consisted of a library, thirty five computers and internet stations, one smart board, and one data show projector. The school also had a separate playground with football field, basketball and volleyball field.

## **Case Five: Middle School No.2**

### **Boys – Government – Village School – School Building**

#### ***School characterisation***

School Stage: *Middle*

School Head Teacher: *1*

School Deputies: *1*

Number of classes: 5

Number of teachers: 15

Number of students: 114

Number of admin staff: 2

**School location:** A village south of Makkah

Building type: *government*

Number of laboratories: 1

Type of playground: *good*

Is it a combined school with other stages? *Yes*

Is it governmental? *Yes*

Does the school have a strategic plan? *No*

Does the school have a vision? *No*

Does the school have a mission statement? *No*

What kind of plan does the school? *One year plan*

Is it a head teacher's plan? *Yes*

Is it a school plan? *No*

Is the school under any educational experimental programme? *No*

Middle School No.2 was a government school located in the same governmental school building which contained the elementary and the secondary schools on the same premises. The middle school had one Deputy and consisted of five classes: two classes in Grade Nine, two classes in Grade Eight and one class in Grade Seven. There were fifteen teachers in addition to two administration staff, and one hundred and fourteen students. There was

one science laboratory in the school but they used the same resource room as the elementary section, which consisted of a library, thirty-five computers and internet stations, one smart board, and one data show projector. The school shared the same playground with the secondary school, which had football field, basketball and volleyball field.

## **Case Six: Secondary School No.2**

### **Boys – Government – Village School – School Building**

#### ***School characterisation***

**School Stage:** *Secondary*

School Head Teacher: *1*

School Deputies: *1*

Number of classes: *5*

Number of teachers: *7*

Number of students: *142*

Number of admin staff: *2*

**School location:** A village south of Makkah

Building type: government

Number of laboratories: *2*

Type of playground: *good*

Is it a combined school with other stages? *Yes*

Is it governmental? *Yes*

Does the school have a strategic plan? *No*

Does the school have a vision? *No*

Does the school have a mission statement? *No*

What kind of plan does the school have? *One year plan*

Is it a head teacher's plan? *Yes*

Is it a school plan? *No*

Is the school under any educational experimental programme? *No*

Secondary School No.2 was a government school located in the same governmental school building which contains the No. 2 elementary and middle schools on the same premises. The secondary school had one Deputy and consisted of five classes: two classes in Grade Ten, two classes in Grade Eleven and one class in Grade Twelve. There were seven teachers, in addition to two administration staff, and one hundred and forty two students. There were two science laboratories in the school and one resource room that consisted of a library, thirty five computers and internet stations, one smart board, and one data show projector. The school shared the same playground with the middle school, which had football field, basketball and volleyball field.

The Head Teacher had a one year plan for his day-to-day tasks and responsibilities to manage all three stages, because he was also the Head Teacher of the other two No. 2 schools. The plan contained the staff duties for the duration of the school year. The school was not under any educational experimental programme.

The school Head Teacher was considered to be one of the excellent leaders in the urban

area. He welcomed the idea of participating in the study, because the Educational District had decided to separate the elementary school from the other stages in another building from the next educational year, and the staff would be divided between two locations. Therefore, he thought it was a very good idea to prepare for this change by a strategic plan. The school teams were highly motivated by him to engage positively in the study. Different groups of teachers from each stage participated in the study and the workshops, in addition to external stakeholders that attended to participate in developing the school vision and mission statement. The co-operative school teamwork was able to finish developing the MSPM throughout two weeks of hard working, meetings and brainstorming sessions. They met more than three hours a day for ten working days.

The timing of developing the school strategic plan was in the middle of the second term, but they managed to succeed in providing the right time by making several changes in their schedules to attend the workshop and the sessions during the school days. The Head Teacher provided the team with every necessary equipment, encouragement, refreshments, substitute teachers, and support to participate in the MSPM project. In addition, he was with them step-by-step in spite of his responsibilities. Almost all the teachers in the school participated in the project in a very organised way. The optimistic teachers participated in stating the strengths and the opportunities in the school, while the pessimistic teachers were involved in declaring the weaknesses and the threats in the brainstorming sessions. The process of developing the school strategic plan was completed, and everyone was happy about the results.

The Head Teacher's part in selecting and coordinating the teamwork was very important. He knew every one of them, and therefore he selected the right group for the right part of

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the project with the help of the facilitator. The staff from all the three stages were involved in the project. The groups were asked to develop and suggest the school vision during the workshop. Every group prepared their vision and tried to protect their ideas from being changed or eliminated any part of it. The facilitator gave them some time to debate, and then he took their votes to select the keywords from each suggested vision. There were about twenty-five selected words. Another voting process took place to minimise the possibilities, until they reached seven intensive keywords. At the end of the session the vision statement was developed by connecting these keywords. Everyone believed that this final vision was his own vision, he had contributed in this construction process and everyone was glad. The same techniques were used in developing the school mission statement and the school values. The feedback of this voting process was very encouraging, since it was their first time to take a democratic decision based on voting in any matter concerning the school.

### ***Interview analysis, Combined Schools No 2***

#### **Initial interview**

The initial interviews with the No. 2 combined schools (Elementary, Middle, and Secondary) Team were held as both individual and group interviews in the school offices. The individual interviews were with the Head Teacher, two Deputy Heads, the school SGT, and the SAL. Each interview lasted from fifteen to twenty minutes. The group interview was with a Biology Teacher, a Specialist in Elementary Classes and an Islamic Education Teacher. They were from the three educational stages. The group interview took about twenty-five minutes. It took one working day to finish all the initial interviews.

## **Type of planning**

**Ahmad Makhdoom:** what type of school planning do you have in your school; is it short-term planning (daily - weekly), medium-term planning (quarterly - annually), or is it long-term planning (three to five years) or maybe more than five years?

The Head Teacher said that the school plan was organised as an annual plan. Most of the staff participated in putting together the school plan, which contained their duties and responsibilities during the school year.

**Head Teacher 4:** It is organised as an annual plan, a big part of which might be materialised or just a few subjects or targets. There might be obstacles which would be taken into consideration and placed within the feedback for next year. We, teachers, Deputies, student instructors, all participated in putting together the school plan. A complete school plan that included the various programmes relating to the Students, special programmes regarding professional progress of the teachers, students' activities, and students guidance, each in their duties. The duties of the Head Teacher are numerous, nearly 1500 duties in the year, but the plan concentrates on what should be accomplished within a specific period of time.

The Elementary Deputy said that he had his own quarterly plan regarding his tasks. The Deputy Head of the middle and secondary schools was asked if he had a plan. He also stated that he had a quarterly plan for his duties. However, this plan was part of the Head Teacher's plan.

**Deputy Head 5 :** It is a quarterly plan which comprises weekly assessment, which means it has been programmed according to the weeks in the academic term. It is not the Head Teacher's plan; it is independent and belongs to me personally. It is regarding the teaching process on the academic day or academic week as from queuing up in the morning, supervision of shifts, and attendance of teachers at classes and teachers' visits. We schedule and programme all this during the week.

**Deputy Head 6:** There must be a plan for the usual follow-up work such as distribution of books and tasks to students, in addition to the routine work such as follow-up on the students, their absences, and securing the daily classes and repeated work. It is called a quarterly plan because of the minor difference between the first and second academic terms.

The Teacher who was responsible for the Student Activities had the annual general plan that came from the Ministry or the Educational district.

**SAL 4:** We have a general plan for all our activities. I mean at the beginning of the year we have to set out a complete comprehensive plan which indicates the progress of the activities during the first term. The second term has another general plan by the Educational District in addition to the school plan. The plan is annual and comes from Makkah Educational District. The general plan is sent to us and on that basis we work out an internal plan comprising of a variety of activities for the first and second terms as well as the participations.

The Teacher who was responsible for Student Guidance followed a term plan that came also from the Ministry of Education.

**SGT3:** It is a weekly plan for a period of 15-17 weeks covering a full academic term. We follow always the Ministry's plan, which is distributed over two terms. We sometimes receive instructions to be followed at certain weeks such as prevention of smoking and explaining its damages etc.

The three Teachers talked about daily, weekly, and monthly plans that distributed their work of teaching certain subjects in the classes' curriculum and their activities with the students. One of the Teachers wondered if there should be plans for the teachers.

**Teacher 2:** There are daily and monthly plans and there are targets that we fulfil on monthly on academic terms basis.

**Teacher 3:** What do you mean by the plan? The plan for the teachers is to distribute the academic schedule on daily, weekly and quarterly basis. It improves the level of students' achievements, as these plans are remedial plans.

**Teacher 4:** It is the plan that I work according to, at least on weekly basis and to see what results are accomplished. Plans differ according to circumstances.

It can be noticed from their responses that the administrative staff had plans that were annually or quarterly for their duties and responsibilities during the academic term or year. However, the teachers were just planning for the curriculum and how would they distribute it during the academic year. Additionally, it can be understood from their answers that they did not have long term plans for their own professional development.

### **Experiences in strategic planning**

When the participants were asked about their experiences in school strategic planning, all

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of them answered negatively. No one had any information about the expression ‘school strategic planning,’ one of them even asked what is planning? The interview question was: “Have you read or heard of an expression ‘school strategic planning’ before?”

**Head Teacher 4:** I have not read but heard about it. From the name it appears to be exaggerated and complicated as if the name has a sort of fear or difficulty which I have not understood to date.

One can feel the fear of the word strategy from the Head Teacher’s answer. He assessed the word to be difficult and complicated. The Deputy Head Teacher, Deputy Head 5 , did not know what the words ‘strategic planning’ meant. When this researcher asked him: “What does strategic planning mean to you? Have you heard of it or read a book about it?” He said: “I do not know exactly. I have not read about it.” The other Deputy understood that strategic planning is only known at the Ministry level, but not at the schools’ level.

**Deputy Head 6:** It is known as a general idea at the level of the State and the Ministries, but at the level of the schools then the subject is unclear to me.

The Student Activities Leader had heard about other kinds of strategies, but not school strategic planning.

**SAL 4:** No. I do not know. I have heard of teaching strategies or strategies of war, but I did not understand them.

**SGT 3:** No I have not attended a course and I think that strategic planning is a base which might change circumstances. It is something new for me.

All the Teachers had nearly the same answers; they did not have enough experience. A few of them had just heard about strategic planning, therefore their general understanding was very fragile about the subject.

### **Meaning of strategic planning**

Several questions were asked in this part of the interview to discover the previous knowledge of the team concerning the issue of school strategic planning: “What does strategic planning mean in your opinion? What do you expect it to be? Is the strategic planning process easy or difficult?” Their answers revealed that they knew very little about the subject. Some of the answers revealed the fear of the word strategy, while others were just wild guesses.

**Head Teacher 4:** I cannot discuss this subject as I have not read a lot in this field and if I give an opinion it would not be a sufficient one.

**Deputy Head 5:** It could be good preparation for something in the future. Difficult or easy, that depends on the specialist.

**Ahmad Makhdoom:** What do you mean?

**Deputy Head 5:** It means that if an individual has knowledge of strategic planning, he could be a successful individual at it.

**Deputy Head 6:** The main aim of strategic planning is to progress knowledge, skills and attitude of the students, and this needs programming, activities and schedules. The school is not authorised and is unable to work out these issues according to the plan. I therefore say that the school is considered as an

implementation unit but strategic planning should be at the level of the Educational District or possible at the Ministry level.

**SAL 4:** I do not know.

**SGT 3:** It is something new for me. I do not know but it could be a new base or method for planning.

These were the answers of the school administration staff; the Teachers, however, were in some way near the true meaning of the term strategic planning.

**Teacher 2:** It could be for a period of five years or less.

**Teacher 3:** It is a plan for the distant future, possibly for 20 years or more, when it could be implemented in the future

**Teacher 4:** The plan could be for the distant future, and it could also be a number of projects for the purpose of gradually implementing one target.

### **The need for school strategic planning**

To investigate this part of the study in the interview, a number of questions were asked. Most of the school administration staff were not certain if they needed strategic planning for their school. This researcher asked them this question.

**Ahmad Makhdoom:** Do you think that schools need strategic planning or are they content with what they have?

The teacher who was responsible for Student Guidance said: “They might need it for the purpose of progressing and changing for improvement, which would be essential in that

case”; the Student Activities Leader had the same opinion; the Deputies thought it might work; and the Head Teacher believed that they would put their best efforts to make it succeed. All of them agreed to attend the workshop if it were in the school day. The interviewer asked them this question: “If you were offered a course in strategic planning, would you attend the course?” The teachers’ answers were different when the question was: “Where would you put this issue in your priorities: 1- most important, 2- important, 3- less important?”

**Teacher 3:** We would consider it as most important, No. 1

**Teacher 2:** If we were offered a course in strategic planning, we would prioritise it as most important and I would categorise it at No. 5 out of 10.

**Teacher 4:** we would put it at No. 1 if it was free of charge and at No. 10 if we had to pay for it.

### **The adoption of school strategic planning in Saudi Arabian schools**

To look into the participants’ points of view in the matter of school strategic planning in Saudi Arabia, the next question was asked: “Why do we, in Saudi Arabia, lack strategic planning, whereas it exists in several developing countries like the Emirates and Bahrain, let alone the advanced countries like the UK, Canada and America? What are the reasons, in your opinion?” The Head Teacher thought that the causes were lack of awareness, lack of training, and the fear of the word strategy.

**Head Teacher 4:** The non-existence of concentrated courses in this field, as well as lack of awareness of this kind of planning, due to the same being unknown to the

people, in addition to the existence of fear of strategic planning (the word itself is frightening).

The Head Teacher continued his response to the question by passing the blame onto the Ministry of Education and Head Teachers.

**Head Teacher 4:** The efforts of the Ministry are insufficient and there was no interest and no co-operation by Head Teachers. Many Head Teachers wish for the least of extra efforts possible due to the enormous demands of them at the present time.

The interviewer asked the Head Teacher about his opinion of the reasons that prevented the other school Head Teachers from trying strategic planning. Did they have their old methods by which they are convinced, and did not want to try a new one?

**Head Teacher 4:** This is possible, for two reasons: the first is the probability that a Head Teacher has a plan which he believes is suitable for the school and its ability, and the other reason is that the strategic plan needs a long period of time to form a plan in my personal opinion now, and a long time for the authorities to believe and approve the same.

The Deputy of the Elementary School believed that the Ministry's regulations might contradict with strategic planning, while the Middle School Deputy thought that this issue must be scheduled and circulated from the Ministry of Education.

**Deputy Head 6:** I do not have an answer for this question, because I believe that as long as there is State Administration and regulations that contradict planning then

you cannot implement strategic planning.

**Deputy Head 5:** As for me, I cannot give a judgment on this subject, maybe because it is not scheduled for us by the Ministry. Consequently, that we can understand and implement it if it has been requested by the Ministry.

The teachers' responses differed from one to another. In general, they thought that the centralisation system of the Ministry of Education, along with the confusion as to the true meaning of the subject, in addition to the lack of co-ordination between the Ministry and the schools communities are the reasons for not adopting school strategic planning in Saudi Arabia.

**Teacher 4:** I think because we have a centralisation system, and the plans come from the Ministry defined and scheduled in a certain way.

**Teacher 3:** Because the correct understanding of strategic planning is not clear to us in Saudi Arabia. The other reason is does the Ministry have financial capabilities to implement this as well as having the technical and qualified cadre that can carry out this work?

**Teacher 2:** There is also no link between the ministries, neither is there educational awareness in this field or ability of the public.

Answering to the question: "What do you expect that the MSPM can give you in terms of teaching?" The Head Teacher said that he could accept the Strategic Planning Model if it gave good results. He expected that the MSPM could help in making the teachers more compelled to their work.

**Head Teacher 4:** The performance of teachers can improve if we concentrate on them and cover them in our planning, despite looking into the meaning of strategic planning itself, because the participation of the teachers in the decision-making will result in binding them to their obligations. The fault in the current planning is that the supervisor or the Head Teacher, when setting out a plan, does not include others, whereas if they participated with him, they would feel more obligations and fulfilling to the targets as these targets were agreed by themselves and their efforts would be doubled in the implementation process thus fulfilling these targets.

### **Limitations of strategic planning in schools**

Most of the team thought that one of the most important obstacles to school strategic planning was the centralisation system in the Ministry of Education. This system might cause the disapproval of their strategic targets, in addition to the delay or shortage of financial support. Moreover, some thought that the authorisation to conduct Strategic Planning would need a long time. Furthermore, the Head Teacher's time in any school could be shorter than the Strategic Planning time, "less than five years," therefore he would not be able to finish the whole course of targets and goals.

**Teacher 4:** The schools are considered as implementation fields bound by a plan to be complied by the Head Teacher, but the Educational District needs a plan because the schools, at present, are not in the higher administration or the intermediate administration, but it is the operational administration that does not need strategic planning. The school staff are tied up within a system and the regulations control their actions. There are also no human resources or authorisations. We, as an executive administration, cannot carry out this work on

our own. These are the obstacles.

**Teacher 2:** In reality schools need annual plans only. However if the Head Teacher is certain of his position for more than a year, he could set out a plan for a distant future. It is noted that if a new Head Teacher is appointed, he cancels all the old plans and starts new ones, and so on.

The Teachers seemed to think that in order to conduct the strategic planning process in any place or organisation they should have full authority and control to every aspect and decision in the establishment.

**Teacher 3:** The school needs strategic plans as the school is a link in a chain so you have to join the links in order to reach a specific target.

**Teacher 4:** Yes, but if the authorisation is left to us, then schools have to set out their strategic plan.

**Teacher 2:** We normally extremely drown in centralisation, and in my opinion we do not have the authority to change the curriculum or a lot of issues, but that should not prevent us from asking for school strategic planning, to exit gradually from this centralisation.

The last answer could be considered as a very encouraging one. The Teacher thought strategic planning could be the first step to gradually decentralising the educational system.

Finally this researcher thanked everyone for their time and participation, hoping they would benefit from the workshop on school strategic planning.

### **Combined Schools No. 2 Final Interview:**

This final meeting with the Strategic Planning Team of No. 2 Elementary, Middle and Secondary Schools took place two weeks after the workshop sessions for setting out the Strategic Planning Model for the different schools. The school had celebrated, at the end of the previous week, the final performance of the classroom and non-classroom activities where the new vision and mission were exhibited to the school in the presence of students' guardians, students and representatives of the Makkah Educational General Administration. The first question to the team was about the reception of the school community toward their new vision.

### **The effect of school strategic planning**

The Elementary School Deputy said that the school was busy distributing and explaining the new school vision to the school community.

**Deputy Head 6:** We began with presenting our new vision to them and made several speeches from the School Administration to the Students' Guardians, as well as circulars inside and outside the school, and the reaction was positive.

This researcher asked if they had any questions, opinions or comments on the subject of planning in general. The Second Deputy replied that there were no questions.

**Deputy Head 5:** They had no questions on the subject. Frankly most of the villagers did not know what vision is, but in general they felt content to know that the school was thinking of their children's interests.

Normally a large number of the students' guardians in the villages were not highly educated; they did not have enough information about strategic planning. Nevertheless, they were pleased that the school was taking care of their children by conducting a new project. It can be noticed that even in a village school, a strategic planning project can improve the school image, in addition to bringing the school staff and the guardians together in a positive way.

### **Difficulties in the school Strategic Planning Model**

The next part of the interview was to define the team's opinion about the MSPM. The researcher asked them first if it was difficult to apply the MSPM. And if there were any problems in implementing any step in the model? Most of them believed that they needed a facilitator in order to implement the strategic planning process. The Student Activities Leader believed that it was difficult when they tried to set the priorities of their targets.

**Teacher 3:** When we prioritise and I mean the important and then the most important and when to sample a step.

A Teacher thought that it was difficult to decide on the targets according to their abilities and chose the right deadline time to achieve their goals.

**Teacher 2:** When we set out the general and special targets, then we looked into what can be fulfilled according to our abilities in the first, second and third year and so on. The Head Teacher makes a decision on the execution of the procedures, who does what and when can implementation take place.

One Deputy Head Teacher had questions on the criteria for their decision-making process.

**Deputy Head 6:** On what basis do we make our decisions, and who determines abilities and priorities?

In a school such as the No. 2 schools, the process needed a lot of effort and consideration from the facilitator to understand the village situation. For example, what was considered normal student behaviour that did not need any correction in the village, might be measured as inappropriate student behaviour in the city.

### **Limitations of strategic planning in schools**

This part of the interview tried to investigate the limitations of school strategic planning in village schools. The Team talked about their concerns and the barriers to implementing the process in such a local society. The question was: What were the problems or obstacles you faced when implementing the strategic planning?

**Teacher 3:** The biggest problem is the local society which has a simple level of education, the non-existence of authority and lack of abilities.

The Head Teacher thought that there were no problems in implementing the process in the school if they distributed the tasks in a proper way.

**Head Teacher 4:** Procedures are very important, such as the distribution of tasks (strategic planning does not extend outside its abilities).

This Teacher was concerned about one of their biggest weaknesses: the school electricity supply. In addition, he tried to explain what they need to do in the next phase.

**Teacher 3:** We suffer from the electricity problem for the past two years. A meeting was held at the school and consideration took place to determine the strong

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and weak points as well as opportunities and threats. The reality is that there are eight sources inside and outside the school and we have set these issues comprehensively. What we need to do now is to transform this into procedures, which is not an easy task especially in respect of abilities.

The other Teacher reminded the group of the flexibilities that were needed in the process. He concentrated on the time needed and the follow-up tasks.

**Teacher 4:** Strategic planning and its procedures need patience and toleration in order to fulfil the vision as well as following up on the work.

The Deputy Head Teacher talked realistically about the balance between the action needed and the school's resources in order to accomplish the school vision in a proper manner.

**Deputy Head 5:** I think that a good strategic plan should not extend further than its actual limit of abilities and should put its targets realistically. As for the abilities, there should be a way of liaising with the Administration in order to obtain the necessary support and to provide abilities, in order to know what we can do to reach our vision.

The Second Deputy Head Teacher placed emphasis on the importance of the evaluation step, which could limit the benefit of the process if it was not implemented correctly.

**Deputy Head 6:** It is a presumption that when you put forward a target you should set out a procedure to be implemented and in the implementation process you should carry out an assessment.

### **Benefits of school strategic planning**

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The interviewer asked the team about their opinion as to the benefits of the MSPM and what they had gained from it? Their responses were positive to a large extent. Most of them hoped that they would overcome any obstacles and continue the operational phase with a good rate of success. The Head Teacher was pleased with the part of the project that grouped everyone in the school together in the direction of achieving the school vision.

**Head Teacher 4:** Strategic planning has big benefits which we detected on the faces of the people in charge and the students' guardians and it keeps everyone at the school busy in the same direction. It is a joint project and has a kind of excitement and initiative to some extent as well as giving the opportunity to assess your efforts after two or three years.

The Science Teacher hoped that they would be able to convince the General Administration to deliver the finance and the resources that the school would need to achieve their goals.

**Teacher 3:** Thank God, I can say that there is no doubt that the school benefits greatly from the existence of strategic planning which resulted in producing the vision and mission. All that is left for us to do is to construct general targets and an implementation plan on which he work will be based. It would need organising meetings, completing the setting of targets and other procedures in order to fulfil this vision. Sometimes we do not have abilities such as reducing tasks of teachers or increasing the number of teachers of a specific field, which are all obstacles that need remedies. I mean coordinating with the Educational District Administration.

This Teacher expected good results as long as they were not contradicting the

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Government's Educational Policy.

**Teacher 2:** Planning for a period of 3 years is not easy and I think the outcomes will be good and going along with the Educational Policy, but when can implementation take place.

The interviewer thanked everyone for their time and participation in the study, hoping that they would take every opportunity to improve their school and achieve everlasting success for their students.

## **Case Seven: Elementary School No. 3**

### **Boys – Private – City School – Rented Building**

#### ***School characterisation***

**School Stage:** *Elementary*

School Head Teacher: *1*

School Deputies: *1*

Number of classes: *18*

Number of teachers: *29*

Number of students: *316*

Number of admin staff: *2*

School location: *Makkah*

Building type: *rented building*

Number of laboratories: *1*

Type of playground: *poor*

Is it a combined school with other stages? *Yes*

Is it governmental? *Private*

Does the school have a strategic plan? *No*

Does the school have a vision? *No*

Does the school have a mission statement? *No*

What kind of plan does the school have? *One year plan*

Is it a head teacher's plan? *No*

Is it a school plan? *Yes*

Is the school under any educational experimental programme? *No*

Elementary School No. 3 was a private school that was located in a street to the south of Makkah the Holy Capital. This building was built as a house that contained several receptions and many bedrooms on three levels. These rooms were modified for use as classrooms and management offices. Elementary School No.3 was a combined school with Middle School No.3 and Secondary School No. 3; the schools had a School General Manager and two school Head Teachers, one for the Elementary and another for the Secondary and Middle Schools, in addition to several school Deputies. Elementary School No. 3 had one Student Guidance Tutor, and one Student Activities Leader. The Elementary School consisted of eighteen classes: three classes in every grade from One to Six that had less than twenty students in each class. There were twenty-nine teachers in addition to two administration staff, and three hundred and sixteen students. There was one science laboratory in the school and one resource room that consisted of a library, twenty computers and internet stations, one smart board, and one data show projector. The school had a closed and air-conditioned playground that could be used as a small football field which might change to basketball and volleyball fields during the day. The school was not under any educational experimental programme. The school was owned by a private company.

## Case Eight: Middle School No. 3

### Boys – Private –City School – Rented Building

#### *School characterisation*

School Stage: *Middle*

School Head Teacher: *0*

School Deputies: *1*

Number of classes: *8*

Number of teachers: *15*

Number of students: *150*

Number of admin staff: *2*

School location: *Makkah*

Building type: *rented building*

Number of laboratories: *1*

Type of playground: *satisfactory*

Is it a combined school with other stages? *Yes*

Is it governmental? *Private*

Does the school have a strategic plan? *No*

Does the school have a vision? *No*

Does the school have a mission statement? *No*

What kind of plan does the school have? *One year plan*

Is it a head teacher's plan? *No*

Is it a school plan? *Yes*

Is the school under any educational experimental programme? *No*

Middle School No. 3 was a private school that was located in a street to the south of Makkah the Holy Capital. This building was purpose-built, on three levels containing twenty two classrooms, and several management offices. The building was next door to Elementary School No. 3. Middle School No. 3 was a combined school with Secondary School No. 3, with a School General Manager and one school Head Teacher for the Secondary and Middle Schools, in addition to two school Deputies. Middle School No. 3 and Secondary School No. 3 shared one Student Guidance Tutor, and one Student Activities Leader. The Middle School consisted of eight classes, three classes in Grade Seven, three classes in Grade Eight, and two classes in Grade Nine. Each class had less than twenty students in the classroom. There were fifteen teachers, in addition to two administration staff, and than one hundred and fifty students. There was one science laboratory in the school and one resource room that consisted of a library, twenty computers and internet stations, one smart board, and one data show projector. The school also had a closed and air-conditioned playground that could be used as a small football field, which might changed to basketball and volleyball fields during the day. This playground was shared with the Secondary School. The school was not under any educational experimental programme. The school was owned by a private company.

### **Case Nine: Secondary School No. 3**

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**Boys – Private – City School – Rented Building**

***School characterisation***

**School Stage:** Secondary

School Head Teacher: - 1

School Deputies: 1

Number of classes: 12

Number of teachers: 23

Number of students: 249

Number of admin staff: 2

School location: *Makkah*

Building type: rented school building

Number of laboratories: 2

Type of playground: *satisfactory*

Is it a combined school with other stages? *Yes*

Is it governmental? *Private*

Does the school have a strategic plan? *No*

Does the school have a vision? *No*

Does the school have a mission statement? *No*

What kind of plan does the school have? *One year plan*

Is it a head teacher's plan? *No*

Is it a school plan? *Yes*

Is the school under any educational experimental programme? *No*

Secondary School No. 3 was a private school that was located in a street to the, south of Makkah the Holy Capital. The building was purpose-built on three levels and contained twenty-two classrooms and several management offices. The building was next door to Elementary School No. 3. Secondary School No. 3 was a combined school with Middle School No. 3, with one School General Manager and one school Head Teacher for the secondary and middle schools, in addition to two school Deputies. Additionally, as mentioned above, Middle School No. 3 and Secondary School No. 3 shared one Student Guidance Tutor, and one Student Activities Leader. The Secondary School consisted of twelve classes. Four classes in Grade Ten, four classes in Grade Eleven, and four classes in Grade Twelve. Each class had about twenty students in the classroom. There were twenty-three teachers, in addition to two administration staff, and two hundred and forty-five students. There were three science laboratories in the school and one resource room that consisted of a library, twenty-five computers and internet stations, three smart boards, and three data show projectors. The school also had a closed and air-conditioned playground that could be used as a small football field which might be changed to basketball and volleyball fields during the day. This playground was shared with the Middle School. The school was not under any educational experimental programme. The school was owned by a private company.

The No. 3 schools formed a combined educational stages private school. There were two Head Teachers. The Head Teachers were assigned by Makkah Educational District to manage the schools. The first one was managing the Elementary School and had a one year plan for his day to day tasks and responsibilities. His plan contained the Elementary School staff duties for the duration of the school year. The other Head Teacher was

managing the Middle and Secondary Schools and had a school plan that contained every task, activity, and responsibility during the school year for him and all school personnel. The General Director of the No. 3 combined schools had the company's vision and strategic general plan to supervise the three schools' activities.

An evening meeting for the parents was held in the school to introduce the new process and to give information about school strategic planning to the stakeholders. More than eighty people gathered that evening, and this researcher gave them an introduction about the project and how to participate in it. Next day, different groups of teachers from each stage participated in the study and the workshops, in addition to the external stakeholders who attended to participate in developing the school's vision and mission statement. The co-operative school teamwork was able to finish developing the school Strategic Plan throughout two weeks of hard-working meetings and brainstorming sessions. They met more than three hours a day in ten working days.

The timing of developing the school Strategic Plan was in the middle of the second term, but they managed to succeed in providing the right amount of time by making several changes in their schedules to attend the workshop and the sessions during the school days. The General Manager provided the team with the necessary equipment, encouragement, refreshments, substitute teachers, and support to participate in the school Strategic Planning project. In addition, he was with them most of the time in spite of his responsibilities. All the team members participated in one group during the workshop. They participated in stating the strengths, opportunities, weaknesses and threats in the brainstorming sessions in the school in a very co-operative manner. The process of developing the MSPM was completed, and everyone was happy with the results.

The General Manager's part in selecting and coordinating the teamwork was imperative. The Team members were astonishing in their attendance, participation, and enthusiastic responses. The teachers seemed to be more obedient and more disciplined. The two Head Teachers were not surprised by the Team's engagement; they said this was one of the private school teachers' characteristics. The Team was divided into three groups, and were asked to develop and suggest the school vision during the workshop. Each group prepared its vision and tried to protect its ideas from being changed or eliminated. The facilitator gave them some time to debate, and then he took their votes to select the keywords from each suggested vision. There were about twenty-five selected words. Another voting process took place to minimise the possibilities, until they reached five intensive keywords. At the end of the session, the vision statement was developed by connecting these keywords.

### ***Interview analysis: all three private boys' schools***

#### **Initial interview:**

The initial interviews with the Team from the Private Boys' Schools (Elementary School No. 3, Middle School No.3, and Secondary School No. 3) were held as individual interviews in the school offices. The interviews were with the Elementary School Head Teacher, the Middle and Secondary Schools Head Teacher, the Deputy Head Teacher of the Elementary School, the Deputy Head Teacher of the Middle and Secondary Schools, and the Student Activities Leader. Each interview lasted from ten to fifteen minutes.

#### **Type of planning**

They were asked the first question about what type of planning they had in their schools.

After the Secondary and Middle Schools Head Teacher gave some information about the differences between the private schools and government schools, he stated that he had an annual school plan for two academic terms.

**Head Teacher 5:** In fact, the situation of [the combined No. 3 schools] falls into two categories: First, we have to be under the umbrella, instructions, and programmes of the Ministry of Education. I think this is a sufficient method of fulfilling success for the school; and that is not because I am acting as a Head Teacher appointed by the General Educational Administration of Holy Makkah. There is another element that helps this issue, which is the educational programming set out by the General Director of the Company which owns the Schools. They have promotional and training programmes through the academic year. It is a yearly planning for two academic terms.

The Elementary School No. 3 Head Teacher said that he planned for the whole academic year on a weekly basis. He distributed the tasks and they were documented and signed by everyone.

**Head Teacher 6:** We have quarterly planning divided into weeks through the whole year on a weekly and daily basis and in detail. Each person has his own tasks documented and signed by him.

The Elementary School No. 3 Deputy Head Teacher plans weekly for his tasks and responsibilities:

**Deputy Head 10:** The administrative work came in the middle or at the beginning of the second term. I carried out planning to solve some issues which I came across

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during my work as a teacher. It is planning for my tasks for which I was responsible as well as setting out a plan to resolve certain problems. It includes some points for development and progress, such as when new students with a very low level of English language came to the school, we would need a plan to improve their level. They are considered weekly for the near future.

The Secondary School No 3 Deputy Head Teacher had a deputy head's plan for all his tasks at the school. He described his plan as a daily, weekly, monthly and quarterly plan for his duties in the school.

**Deputy Head 7:** It is daily, weekly, monthly and quarterly and these tasks are repeated in the second term. It is a deputy head's plan for all my tasks at the school.

The Teacher who was responsible for the student activities had a special documented plan for each half term.

**SAL 1:** Yes. Before implementing the plan, we distribute forms to the students so that each student can make a note of the activity he prefers during the two academic terms. The student can choose four options and I try to allow these options as appropriately as possible in such a manner that each half of an academic term is linked to a specific activity.

This compound school had different kinds of plans. The Secondary and Middle Schools Head Teacher had a school plan, the Elementary School Head Teacher had a Head Teacher plan, the Elementary School Deputy Head Teacher had weekly plans, the Secondary School Deputy Head had an annual plan, and the Activities Leader had half term plans. All these plans could be considered short-term to mid-term plans. Not one of them had a long-

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term plan, even though that they had a vision and strategic plan for the Company that owned the school.

### **Experiences in strategic planning**

When the participants were asked about their experiences in school strategic planning, some of them had some information about the subject and they mentioned the Company's vision and strategic plan. The question was: "Have you read or heard of an expression 'school strategic planning' before?" The Head Teachers were among those who attended the author's first strategic planning workshop in Makkah five years previously.

**Head Teacher 5:** The vision and mission statement that I was acquainted with five years ago exists at the General Administration only. However, unfortunately it does not exist at the school level.

The Elementary School No. 3 Head Teacher also attended the course, but did not implement it in the school.

**Head Teacher 6:** Yes, I have attended a course with you five years ago.

The Elementary School Deputy Head Teacher had no experiences in strategic planning at all, but he knew what planning was.

**Deputy Head 10:** Strategic Planning is new to us, although planning has been here before.

The Secondary School No. 3 Deputy Head Teacher had heard about it and read a little about it.

**Deputy Head 7:** I have heard about it but I have never thought seriously about it and do not know its details. Yes I have read a little about it.

The Teacher who was responsible for the Student Activities seemed to know enough information to present a plan for student compulsory service.

**SAL 1:** Yes. I did present a plan for a period of 5 or 10 years in respect of co-operative work between the students and encouraging them to carry it out like a compulsory service.

### **Meaning of strategic planning**

This part of the interview was to explore the Team's knowledge about school strategic planning before the workshop sessions. The two Head Teachers and the Activities Leader had some information about the subject. The question was: "What does Strategic Planning mean to you?" The Secondary School Head Teacher thought it was the first step to modernising our school system in order to get along with the new generation.

**Head Teacher 5:** It means qualified process in the work and being precise in implementation. I personally like anything new and distinctive. The most important thing is going along with this modern generation which is actually considered as the first step to reach the top. Now most of the large establishments believe in training during the service and work towards promotion and renewal. Most of them have their own vision and mission statement.

The Elementary School Head Teacher thought it was planning for the future, while his Deputy thought strategic planning was a wise plan that accomplished specific targets.

**Deputy Head 7:** I think that Strategic Planning is a wise plan that leads to a specific task for the purpose of reaching targets.

The Secondary School Deputy thought it was more organised.

**Deputy Head 10:** Strategic planning is more organised with measures and levels. As for ordinary planning, it is less organised.

The Teacher who was responsible for the student activities thought that strategic planning targets were greater than tactics.

**SAL 1:** Strategic planning in my opinion is a plan for a period of time in the future and setting out targets that are greater than tactics, and strategic planning might take half a century. I wish that the Educational Administration could set out a plan for the youths to protect them from trouble.

### **The need for strategic planning**

In view of the fact that the Company that owned the school had its own vision and strategic plan, the whole school staff in one way or another were aware of the strategic planning process in general. When the subject was brought to them as a special project for their own school they welcomed the idea and they felt they needed it. They responded to the question: “Do you need school strategic planning in your school and why?” by mentioning the benefits of strategic planning: The two Head Teachers thought they needed the project to cope with the Company’s vision. The Deputy thought it was needed because of its benefits to the school and the students.

**Deputy Head 10:** I think one of the benefits of strategic planning is organising the

work thus making the school a complete working organisation and making each student feel he is part of a united organisation.

**Ahmad Makhdoom:** Does that mean it would have benefits for the students?

**Deputy Head 10:** Yes it would, in addition to benefits to the guardians and even to the visitors who would be able to recognise the benefits of this organisation. If the correct strategy was put together for the school then the results would be beneficial to everything that is associated with the school.

The Teacher who was responsible for the students' activities thought that strategic planning information should be available to everyone in the educational field, and furthermore that it should lead to real implementation and not remain only in the papers and documents.

**SAL 1:** I think that Strategic Planning should be available for all the teachers and staff working in the educational field as they have to look forward to the future and attempt to fulfil the targets as much as possible. As for the importance of having a plan, I think the Ministry has this plan; however it is sometimes just documented on papers with no real implementation or monitoring.

### **Luxury or necessity?**

This question was to find out their opinions more about the need for strategic planning: "Do you think strategic planning is a necessity or a luxury?" The Secondary School Head Teacher thought was is an urgent necessity to limit the school's problems by tracking the strengths and weaknesses in the school system.

**Head Teacher 5:** It is an urgent necessity, especially after what I have seen at [ the combined No. 3 Schools]. School Strategic Planning limits the extent of problems and helps to track strength and weakness in the system. I do hope that we will succeed in our process of creating our own special vision and mission in the school.

The Student Activities Leader thought strategic planning was a necessity now, because he was planning for a short period of time, and he needed organised long-term planning.

**SAL 1:** It is more than a necessity because we need Strategic Planning in our work and unfortunately we are only working according to a plan for a short period and not looking to the future.

All the team were interested in the workshop when they were asked by the interviewer whether they would attend or refuse to attend if they were offered a course in strategic planning? They all agree to attend the workshop and to participate in the project of school strategic planning.

### **The adoption of strategic planning**

This part of the interview was to explore the reasons for not adopting school strategic planning in Saudi Arabia, while it was being applied in many developing nations such as Kuwait, UAE, Malaysia and Singapore, not to mention the U.K., U.S.A. and Canada. Were there any specific reasons for this? The Head Teacher thought that it was because the Ministry of Education gave the schools models of weekly and day-to-day planning, and they had to follow these plans. In addition, some Head Teachers looked for the lowest level of effort, and therefore they did not have the initiative to propose or try anything new.

**Head Teacher 5:** Yes, some are looking for the lowest level of achievements in education in our society. They are giving us the weekly and everyday responsibilities which they think it is enough to accomplish the targets, but I think it is only enough for day-to-day activities. We need strategic planning to achieve the creativities and development levels and to look for the future progress. It would be good if we created a website on strategic planning as it would spread this issue.

SAL 1 blamed the Educational Administration, since they were the party that took such decisions.

**SAL 1:** First of all, who is responsible for this, the Administration or the teacher? We have to agree on this point. In my opinion each individual has his own specific vision which he attempts to fulfil in order to reach targets. The problems and the difficulties lie in the implementation. The strategic plan exists at the Ministry but who is implementing it in the proper manner?

The Deputy Head Teacher thought there might be no obstacles if the Ministry of Education determined to take the decision and follow up the implementation.

**Deputy Head 10:** No, there are none, because there is an administration that follows up on this issue but there might be obstacles or some defects in the implementation.

### **The combined No. 3 Schools: final interview**

This final meeting with the Strategic Planning Team of Elementary School No. 3, Middle School No. 3 and Secondary School No. 3 took place after the workshop sessions setting

out the Strategic Planning Model for the different schools. The interview discussed the importance of school strategic planning, and whether it was difficult to apply the suggested Model in school or not. Another main question was: “What are the problems raised as a direct result of implementing the MSPM?”

### **Difficulties in the school Strategic Planning Model**

This part of the interview was to look for the team’s thoughts about the suggested school Strategic Planning Model. This researcher asked them first if it was difficult to apply the MSPM. The Secondary School Head Teacher thought that the ten steps were clear to him. The Elementary School Head Teacher said that when you state your objectives, you had to select the action and activities that were suitable for achieving the objectives. The difficult part was to find out the right action that matched the school’s abilities and financial status.

**Head Teacher 5:** The ten steps were clear and easy to implement. However, the team needed the assistance of you in order to explain every step and to give some examples.

**Head Teacher 6:** Yes, it was not so difficult to me, because I have attended a course with you five years ago. Nevertheless when you state your objectives, you should select the actions and activities that are suitable for achieving the objectives. The difficult part was to find out the right action that matched the school abilities and financial status.

The rest of the group had the same impression; and they thought that after the workshop it was not that difficult. The Deputies thought the model was easy, clear, and understandable.

They were asked about the training period, whether or not it was in their opinion sufficient. The group thought that there was enough time, although the Elementary School Head Teacher suggested that the training session should be outside school hours in order to encourage the Team by giving them overtime salary. The Secondary School Deputy mentioned that changing the school schedule to provide the right time for the group was not easy during the school hours for the teachers and the students.

The interviewer asked them which steps needed further explanation or clarification. They also mentioned that the SWOT analysis needed some clarification between the strengths and the opportunities, because they were all positive points. In addition, they needed to differentiate between the weaknesses and the threats.

### **Benefits of strategic planning**

The discussion then turned to the significance of school strategic planning. They believed that the Strategic Planning Model helped in organising the work, made a practical school analysis, increased allegiance to the school, and identified everything that the school needed.

### **Limitations of strategic planning in schools**

When the group were asked about the expected problems to occur when implementing the MSPM in their school or any other school, they talked about fear of the word strategy, their right to start the process without obtaining permission from the higher management, and resources they might need in order to conduct the project and achieve their target in the school.

The Secondary School No. 3 Head Teacher talked about the nature of private schools. He

mentioned that in the private school there were several Saudi teachers, but they usually did not last for more than two or three years at most. They worked in the private school in order to get some experience in teaching and waited for a government job where they would be more secure, and have more salary. This fact could make the private schools unstable in their staff. A frequently changing staff would need well-organised follow-up procedures to prevent breaking the sequence of the activities or the actions needed to accomplish the school targets. The Secondary School Deputy Head Teacher also spoke about the Team's commitment and the follow-up procedures. Nevertheless, he mentioned that the private school staff usually have more commitment, because staff could be easily changed, and maybe dismissed from the school. Therefore, change resistance was less in the private schools.

The entire group did not envisage any problems from the students or their guardians in conducting school strategic planning. When they were asked about this issue, the Secondary School Head Teacher said he did not think there would be any problems, but if there were any, then they would be insignificant. The Elementary School Head Teacher thought that the team would be able to take care of this problem if it occurred.

### **The effect of school strategic planning**

The conversation then moved to the effects of the school Strategic Planning project, and the Secondary School Head Teacher mentioned that the school Strategic Planning Team would benefit the most from the process, because they would be the keys to motivate everyone else. The Elementary School Head Teacher agreed to that, and in addition he thought the Team's participation in the decision-making process was a big achievement in itself.

The Deputies had the same opinions, because the team's participation in the decision-making process would create feelings of loyalty and unity. In addition, the group thought that the MSPM could help in bringing the school community together to work in a co-operative atmosphere.

At the end of the interview, the author expressed his gratitude to the group for their co-operation and their time, hoping that the school would benefit from the new project to achieve their desired improvements.

## **Case Ten: Elementary School No. 4**

### **Girls – Private – City School – Rented Building**

#### ***School characterisation***

**School Stage:** *Elementary*

School Head Teacher: *1*

School Deputies: *1*

Number of classes: *12*

Number of teachers: *22*

Number of students: *221*

Number of admin staff: *2*

School location: *Makkah*

Building type: *rented house building*

Number of laboratories: *1*

Type of playground: *poor*

Is it a combined school with other stages? *Yes*

Is it governmental? *Private*

Does the school have a strategic plan? *No*

Does the school have a vision? *No*

Does the school have a mission statement? *No*

What kind of plan does the school have? *One year plan*

Is it a head teacher's plan? *Yes*

Is it a school plan? *No*

Is the school under any educational experimental programme? *No*

Elementary School No. 4 was a private girls' school located in a street to the south of Makkah the Holy Capital. This building was built as a residential villa that contained several receptions and many bedrooms on two levels; these rooms had been modified to provide classrooms and management offices. Elementary School No. 4 was a combined school with Middle School No. 4 and Secondary School No. 4; the schools had a School General Manager and two School Head Teachers, one for the Elementary and another for the Secondary and Middle Schools. In addition to two school Deputies, moreover, the combined No. 4 schools had one Student Guidance Tutor, and one Student Activities Leader. The Elementary School consisted of twelve classes: two classes in every grade from one to six, with less than twenty students in each class. There were twenty-two female teachers in addition to two administration staff, and two hundred and twenty students. There was one science laboratory in the school and one resource room that consisted of a library, twenty computers and internet stations, one smart board, and one data show projector. The school had a closed and air-conditioned playground. The school was not under any educational experimental programme.

## **Case Eleven: Middle School No. 4**

### **Girls – Private – City School – Rented Building**

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### ***School characterisation***

**School Stage:** *Middle*

School Head Teacher: *-1*

School Deputies: *1*

Number of classes: *8*

Number of teachers: *15*

Number of students: *145*

Number of admin staff: *2*

School location: *Makkah*

Building type: *rented house building*

Number of laboratories: *1*

Type of playground: *poor*

Is it a combined school with other stages? *Yes*

Is it governmental? *Private*

Does the school have a strategic plan? *No*

Does the school have a vision? *No*

Does the school have a mission statement? *No*

What kind of plan does the school have? *One year plan*

Is it a head teacher's plan? *Yes*

Is it a school plan? *No*

Is the school under any educational experimental programme? *No*

Middle School No. 4 was a girls' private school that was located in a street to the south of

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Makkah the Holy Capital. Middle School No. 4 was a combined school with Secondary School No.4 and was next to Elementary School No. 4, in the same building which had originally been built as a private villa.. The Middle and Secondary Schools had one Head Teacher, two Deputies, one Student Guidance Tutor, and one Student Activities Leader. The Middle School consisted of eight classes: two classes in Grade Seven, three classes in Grade Eight, and three classes in Grade Nine, with fewer than twenty students in each class. There were fifteen female teachers in addition to two administration staff, and one hundred and forty-five students. There was one science laboratory in the school and one resource room that consisted of a library, twenty computers and internet stations, one smart board, and one data show projector. The school had a closed and air-conditioned playground. The school was not under any educational experimental programme.

## **Case Twelve: Secondary School No. 4**

### **Girls – Private – City School – Rented Building**

#### ***School characterisation***

**School Stage:** *Secondary*

School Head Teacher: *1*

School Deputies: *2*

Number of classes: *9*

Number of teachers: *17*

Number of students: *150*

Number of admin staff: *2*

School location: *Makkah*

Building type: *rented house building*

Number of laboratories: *1*

Type of playground: *poor*

Is it a combined school with other stages? *Yes*

Is it governmental? *Private*

Does the school have a strategic plan? *No*

Does the school have a vision? *No*

Does the school have a mission statement? *No*

What kind of plan does the school have? *One year plan*

Is it a head teacher's plan? *Yes*

Is it a school plan? *No*

Is the school under any educational experimental programme? *No.*

Secondary School No. 4 was a private girls' school that was located in a street to the south of Makkah the Holy Capital. It was a combined school with Middle School No. 4 and was in the same converted villa building next to Elementary School No. 4. The Middle and Secondary Schools had one Head Teacher, two Deputies, one Student Guidance Tutor, and one Student Activities Leader. The Secondary School consisted of nine classes; three classes in Grade Ten, three classes in Grade Eleven, and three classes in Grade Twelve, with less than twenty students in each class. There were seventeen female teachers in addition to two administration staff, and one hundred and fifty students. There was one science laboratory in the school and one resource room that consisted of a library, twenty computers and internet stations, one smart board, and one data show projector. The school

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had a closed and air-conditioned playground. The school was not under any educational experimental programme.

The implementation of the study at the No. 4 Girls' Schools was approved by the General Director of the company which ran these schools in Makkah. He agreed to conduct the telephone interview with the girls' schools staff from his office. While the author was in his office, the General Director phoned them, told them about the author, gave them a summary of the study, and requested their co-operation in the interview. It is worth mentioning that all of the female staff asked for written questions to be sent to them, so that they could answer them in writing and return them back to me the next day. However, the General Director insisted on conducting the interview by phone; saying: "this is not a test, just say what you feel is right."

Following the introduction and thanking them for agreeing to participate in the study; the author asked for their permission to record the meeting, assuring them that the recording of their voices would not be used for any purposes other than the study. The Deputy Head of the Middle and Secondary Schools made clear her unwillingness to record her voice in the recorder. Also the Deputy Head for Student Affairs, as well as all the female staff, made it clear that they were not willing to record their voices while conducting the interview. The reasons for not recording the interview at that time were related to tradition and religious factors. While more than one answered that she did not have permission from her husband, others did not give any reasons and just preferred not to record the interview. Therefore, the author recorded just his own part of the conversation in order to remember the dialogue and try to repeat their answers and write most of their responses in order to document everything.

Next day, on the workshop there were about twenty female teachers. The workshop was held in the Girls' School's Building. The author was lecturing from the Elementary School playground, and they were in an inside hall. There was a video and audio communication system between us. They could hear and see the presentations, but the author could only hear them through the microphone and the speaker system. Through the five days' workshop, only four females were communicating with the researcher through the audio system. They did give their permission to record their voices during the workshop, and they agreed to allow the recording to be used in the study. Furthermore, they agreed to use their real names in the study, however, eventually codes have been used.

### ***Interview analysis: all three private girls' schools***

#### **Initial interview**

The following is the analysis of the interviews that took place in the General Director's office with the Head Teachers and the Deputy Head Teachers of Elementary School No. 4, Middle School No. 4 and Secondary School No. 4 at Makkah.

#### **Type of planning**

As usual, the first question was: "What type of school planning do you have in your school, is it short-term planning (daily - weekly), medium-term planning (quarterly - annually), or is it long-term planning (three to five years) or maybe more than five years?"

The Elementary Head Teacher said that she had an annual plan that was divided into quarters, and the plan had all the staff responsibilities in addition to a special plan for the final term's exams days.

**Head Teacher 7:** It is a quarterly - annual plan containing the record of all responsibilities of all the staff in the school. Also there is everyone's duty each day, week, and month. These tasks are categorised before each semester, during each semester, and after each semester. In addition we have a special plan for the exams days.

This researcher asked her if she had any developmental objectives that she wanted to accomplish in the next two or three years, but she said this kind of objectives might be accrued in the General Director's plan.

**Head Teacher 7:** No. but I think the School General Director has.

The Secondary and Middle School Head Teacher had the same kind of plan, but she added that the plan came from the Girls' Education General Administration as records of its quarterly - annual plan.

**Head Teacher 8:** The plan comes from the Girls' Education General Administration as records of quarterly - annual plan. It contains all responsibilities of all the staff in the school in general. You can find everyone's duties each day, week, and month. These tasks are characterised as duties that are supposed to be done before each semester; during each semester, and after each semester, adding to that the special plan for the exams days.

When the interviewer asked her if she had any developmental objectives that she wanted to accomplish in the next two or three years, she said because she was assigned by the Girls' Education General Administration to manage this school, she would not be in this post for more than four years.

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**Head Teacher 8:** No. I do not think that. I will not be in my position for more than four years; I already spent two years at this school.

The Deputies had no written plans and they worked from their experience. One of them said her plan was in her mind, and she had some information in small documents for the duties of tomorrow.

**Deputy Head 8:** I do not have any written plan. I work from my experience and the Head Teacher's orders.

**Deputy Head 9:** I did not have any written plan, but sometimes I wrote some information in brief documents to remind me of tomorrow's duties. Mostly, my work was done according to the Head Teacher's instructions and the general plan was in my mind.

### **Experiences in strategic planning**

No one in the team had any enough information about the expression "school strategic planning"; the interview question was: "Have you read or heard of an expression 'school strategic planning' before?"

**Head Teacher 7:** No; I am sorry I have never read about strategic planning.

**Head Teacher 8:** I have heard about it, but never read about strategic planning; however, I was in a workshop about teaching strategies last month.

**Deputy Head 8:** No, never. However we attended a course on teaching strategies for a period of five days each day from 5 to 9 pm, but I have never heard about school strategic planning.

**Deputy Head 9:** No, not for school strategic planning. Sorry, I have never read about school strategic planning.

Some of them had attended a workshop in teaching strategies, but they did not have any experience in school strategic planning

### **Meaning of Strategic Planning**

In his part of the interview, this researcher tried to get any information about the new notion however, they were very conservative about giving any answers. The question was: “What do you think in your opinion school strategic planning is?” The two Head Teachers did not have any information, while one of the Deputies said it might be reaching objectives in an organised way.

**Head Teacher 7:** I don't have any information about it.

**Head Teacher 8:** As I told you, I don't have any clear information about it.

**Deputy Head 8:** I do not know.

**Deputy Head 9:** I do not know. I don't have any knowledge about it. But I think it is about trying to reach objectives in an organised way and by several steps.

### **The need for school strategic planning**

Trying to discover the opinions of the Girls' Schools staff about the need for school strategic planning, the interviewer asked the Team this question: “If you were offered a workshop in school strategic planning, would you attend the session?” All the participants

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were ready to attend; they all said yes if it was free. When the interviewer asked why? The reasons were different. The Elementary School No. 4 Head Teacher said she needed this information to improve her ability to plan in order to achieve the school goals.

**Head Teacher 7:** Yes, because we need this kind of information. We need to improve our ability to plan and master this skill. We need to exercise and practise strategic planning to get rid of the chaotic and haphazard of the way we do our work and tasks. Furthermore, we need good planning to ensure the achievement of our goals and development. Moreover we need strategic planning to improve our performance convincingly, and to get the most advanced output of our educational process.

The Secondary School Head Teacher agreed to attend the workshop in order to master this important skill and to use it properly. She thought that it was important to improve their school performance and to get better educational outcomes.

**Head Teacher 8:** Yes. We can attend this workshop. But it should be extensive enough to master the necessary skills to employ school strategic planning in a proper way. We need this kind of workshop in order to achieve good quality in our work and responsibilities. I think it is important to improve our ability to plan and master this important skill. Furthermore I believe school strategic planning is significant to improve our performance to accomplish our goals towards our students, and to get better educational outcomes.

The Elementary School Deputy Head Teacher was sure that she would attend the workshop if it was free. However, if the workshop was not free, she would think about it,

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depending on the workshop time and the amount of money.

**Deputy Head 8:** Yes, sure.

**Ahmad Makhdoom:** Would you pay any money to attend the workshop?

**Deputy Head 8:** Mmm... depending on the amount of money and the workshop time.

The Secondary School Head Teacher said that she would be in the workshop only if it was free and offered by the school.

**Deputy Head 9:** Yes, why not.

**Ahmad Makhdoom:** Would you pay any money to attend the workshop?

**Deputy Head 9:** No. but if the school offers this workshop, I will attend it.

### **Luxury or necessity?**

Another question to assess the Girls' Schools' opinions about the need for school strategic planning was: "Do you think strategic planning in Saudi schools is necessary, or is it a luxury?" Both Head Teachers thought school strategic planning is necessary nowadays. Head Teacher 7 said it was necessary to march with the growing developments in the world.

**Head Teacher 7:** Of course it is necessary; especially in these days. In order to march with the growing developments in the world and in our country, we should learn about strategic planning.

The Secondary School Head Teacher thought it should be one of their top priorities; nevertheless they needed enough training and practice.

**Head Teacher 8:** I think it is not luxurious. It should be one of our top priorities nowadays. But we need enough training and enough exercise for the implementing of strategic planning.

Even though all the interviewees recognised the necessity for school strategic planning nowadays, they all felt that they needed the Ministry of Education's orders to begin the process in their school. This feeling was clear in their answers when the interviewer asked them the next question.

### **The adaption of school Strategic Planning in Saudi Arabian schools**

**Ahmad Makhdoom:** School strategic planning is widespread in several countries in the world such as Malaysia, Singapore or even in Gulf States such as Bahrain, Emirates, Jordan and Yemen; in your opinion, why is school strategic planning not implemented in Saudi Arabian schools? What are the reasons?

The answers to this question revealed their dependence on the Ministry's instructions and orders. The Elementary School No. 4 Head Teacher said it was the Ministry of Education's responsibility to spread the awareness of the notion to everyone in the educational field.

**Head Teacher 7:** In my opinion the Ministry of Education is responsible for the non-proliferation in its departments, divisions and schools, because it is their decision. The Ministry of Education should acknowledge, educate, and train everyone in the field. You know we carry out a lot of responsibilities.

The Secondary School No. 4 Head Teacher also said that it was the responsibility of the Ministry of Education, saying that the Ministry is the decision-maker and -taker (absolute compliance to the centralisation system).

**Head Teacher 8:** Ask the Ministry of Education; they are responsible for everything going on in its departments, divisions and schools. The Ministry of Education is the decision maker and taker. It is the organisation that co-ordinates and organises every activity and programme in the field. Maybe its vision and priorities are different from ours. Maybe they are not aware or not approve of its significance yet.

The Elementary School Deputy Head Teacher had the same idea about the subject. She thought strategic planning was not among the priorities of the Ministry.

**Deputy Head 8:** I think school strategic planning is a modern concept in public education. It is likely unknown because there is not sufficient awareness among the managerial levels at the Ministry of Education. It might be because the people do not know about its application in schools. Perhaps the clear idea about school strategic planning did not reach the Ministry to develop this programme among its priorities and to make it obligatory in the field or in schools.

The Secondary School Deputy Head had the same idea, but she emphasised the need for training at the school and the Ministry levels.

**Deputy Head 9:** I think because it did not come from the Ministry of Education until now; or maybe because they did not know enough about school strategic planning. Indeed, we need to know about the concept in public education. We need

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sufficient awareness among the key people at the Ministry of Education. At the school level we need training, and full information about school strategic planning. After all we are executors and we have a lot of responsibilities. The matter should be obligatory from the Ministry of Education.

### **Limitations of strategic planning**

This part of the interview discussed the barriers to school strategic planning. The Elementary School No. 4 Head Teacher talked about the lack of awareness, the lack of desire to learn something new, and the limited resources as important obstacles to school strategic planning.

**Head Teacher 7:** There must be a ministerial decision in order to spread the school strategic planning notion in the Kingdom. They must also adequately train all the employees in the Ministry, departments, divisions and schools. school strategic planning should be successfully practised everywhere in the Ministry. In my opinion the lack of awareness is the most important obstacle that prevents its spread, and there is a lack of desire to learn something new for some people. In addition some individuals do not like writing and recording every action. They prefer to carry out their tasks randomly or from their memory, and this will not accomplish the quality performance of our work. Furthermore, I think that the potential human ability and for most schools the limited resources may prevent them from implementing school strategic planning and meeting its requirements.

The Secondary School Head Teacher mentioned several points as obstacles to school strategic planning, beside the fact that schools were the executive part of the Ministry. In

addition, she talked about the problem of staff stability in the private school.

**Head Teacher 8:** The lack of knowledge about this matter is a very important factor in this issue. This factor should be solved by educating people about the notion. The ministerial decision is very important in order to spread the awareness of strategic planning in the Kingdom. They should conduct excessive training sessions. As teachers in a private school we cannot take initiatives and initial moves alone. We are just executors; we take our orders from them. Moreover, in the private schools despite the weak salaries given to administrators and teachers, our working hours are more than those in any governmental schools. Therefore, you will not find staff stability for long time; as a result any teacher who can find a government job, will grasp it without any hesitations. And you will not find more initiatives; we can barely implement what is required from us. Furthermore, strategic planning consumes a lot of time and money and we need to balance our outcomes and incomes in this matter. Nevertheless, if the school management (I mean the company) are convinced the programme is significant, the teachers in any private school will not cause too much opposition. They are usually more co-operative and more obedient, because they can lose their jobs much more easily than any teacher in a government school.

The School Deputy thought that it was not the school's duty to take such initiatives and submitted to the Ministry. She said that the school staff had enough duties already.

**Deputy Head 8:** I suppose that the huge tasks, routine responsibilities and many clerical works consume our time at work and home. Therefore, we can rarely find

the time for such initiatives.

The same point of view was presented by the other Deputy Head Teacher, which was the lack of time they had for such projects.

**Deputy Head 9:** No, I don't think that. We have huge responsibilities and a lot of work for the duration of the workdays. We don't have time. The administration should create the time for us to participate in such subjects.

### **Final interview**

The meeting was held after the workshop, and after completing the school Strategic Planning process. The interview was with Head Teacher 8, the Head Teacher of Secondary School No. 4; Head Teacher 7, the Head Teacher of Elementary School No. 4; Deputy Head 9, the Deputy Head of Elementary School No. 4, the Deputy Head of Secondary School No. 4, and some members of the school Strategic Planning Team. The interview discussed the importance of school strategic planning, and whether or not it was difficult to apply the MSPM in the school? What were the problems raised as a direct result of implementing the MSPM?

The interview took place in the No. 4 Girls' School through the audio communication system. The Head Teachers and Deputy Heads were collecting the answers from other Team members and exchanged the information with the author. This was such a unique and exciting experience for the author. Making this kind of study inside the girls' schools was one of the research challenges that had only been overcome with a lot of patience and co-ordination between the key people in the Educational District and himself. Until recent times this interview could not have taken place unless it was only between females.

However, nowadays with a lot of open-minded management people in the offices, in addition to the use of high technology, it was possible for this interview to be conducted. Researcher and participants managed to keep to their principles and Islamic teaching, while at the same time making this communicational progress between the two genders.

### **Difficulties in the school strategic planning model**

The first question in this part of the interview tried to reveal the Team's opinions about the difficulties in the suggested model. This researcher asked if it was difficult to apply the MSPM. The Secondary School Deputy thought that at the beginning the process seemed to be a very complicated issue, but after the step by step clarifications it became logical and understandable.

**Deputy Head 9:** School strategic planning was not difficult; before the workshop I thought it was a very complicated issue. However, after the model was clearly demonstrated step by step, we implemented it without too much difficulty.

The Secondary School Head Teacher also agreed that after the workshop the process can be done in any school, especially if the school has a co-operative team.

**Head Teacher 8:** It is not difficult. Indeed, after the training workshop on the model step by step, the team did a good job in creating a lot of productive thoughts. We all believe that it can be done in any school with a co-operative team. On the other hand, the understanding and full co-operation from higher management is essential and highly required. You know their approval to what we are going to do is crucial to support us physically and mentally.

Deputy Head 8 thought that two factors were visible after the success of implementing the Model, one of them was the suitable training time.

**Deputy Head 8:** I think there were two factors that helped us understand the subject and made it applicable in the school: first, we spent the appropriate time in training; second, the model steps were rational in order and chronological which made it easy to understand. I believe this is the way schools should be managed. This is the institutional way.

The Elementary School No. 4 Head Teacher emphasised the need for a facilitator to lead the strategic planning process.

**Head Teacher 7:** I agree that it was not so difficult, adding to that the steps were practically clear and easy to explain; however no school can implement the process by itself.

**Ahmad Makhdoom:** Head Teacher 7, would you please explain why a school cannot implement the process by itself?

**Head Teacher 7:** I mean they might need someone to describe every step to them. They might need a supervisor or facilitator to accompany them through the process until they finish the planning process.

The Secondary School No. 4 Head Teacher highlighted the importance of the Head Teacher's responsibility to communicate with the stakeholders in order to achieve the higher management goals and objectives.

**Head Teacher 8:** I think it depends on the School Head Teacher and his or her

readiness to conduct this kind of planning in the school. School strategic planning implementation needs to be participatory. All the people who are concerned with the school should take a part in the creation, or at least to be informed about the school vision. Plus this hard work and dedication led to continuous communication with everyone in the school environment. I think some people might not have the ability or the desire to do that. Moreover, we cannot ignore the higher management's goals and approval. I mean the Ministry of Education, the Educational District and the Company [which owns the school]

Head Teacher 8 identified other impediments to the implementation of the school Strategic Planning process in general.

**Head Teacher 8:** Yes, the school daily work pressure, the shortage of school staff, and the staff stabilities can be counted as important factors of impediments. In my opinion the school Head Teacher should stay in office for six years: the first year for planning, and the next five years for putting in action and achieving his or her vision.

Most of the team thought that the suggested school Strategic Planning Model was clear, comprehensible, and not complicated. In addition the training period was enough to understand all the steps. However Head Teacher 8 mentioned that every school should have more than twenty hours in training and workshop sessions.

**Deputy Head 8:** I think it is clear.

**Head Teacher 8:** As we told you before, it is comprehensible but we need good training and a facilitator.

**Head Teacher 7:** Yes, it is not that complicated. However, the notion of strategic planning was strange and new to almost everyone.

**Head Teacher 7:** More than twenty hours were sufficient for most of us.

**Head Teacher 8:** I suppose the training time was adequate, but can we provide every other school with the explanation and coaching in the workshop? This is very important.

All the steps were clear and self explanatory, except SWOT analysis which needed more time to distinguish between the strengths and the opportunities and also between weaknesses and threats.

**Head Teacher 8:** In the beginning, some of us were not interested or were afraid, but after the training sessions everything was clarified and simplified.

**Head Teacher 7:** We have needed more time in SWOT Analysis to differentiate between the strengths and the opportunities; likewise between weaknesses and threats. However, everything is clear now.

### **Limitations of strategic planning in schools**

The conversation moved on further by asking the participants what were the problems or the obstacles in implementing school strategic planning in general? The interviewees mentioned the importance of the time needed to accomplish this process, besides the good training.

**Head Teacher 7:** In order to implement School Strategic Planning we need the proper time. I think giving the process the right amount of time is an essential

matter. If the people do not know how to do it right they will end up with a bad strategic plan. We had to sacrifice a precious amount of time taken from our families and students in order to get this valuable process done.

The Head Teacher talked about change resistance as a barrier to implementing the School Strategic Planning Model.

**Head Teacher 8:** Again the resistance to environment change is very important in this issue. We should think about the people who are going to receive the new vision. Their acceptance or resistance should be accounted for. We might find huge resistance for some of our programmes from bureaucrats, officials, parents or even some teachers. We should prepare carefully how to deal with them. In order to make the school environment help and engage in the implementation of Strategic Planning we have to act positively towards the resistance and ignorance from inside and outside the school. Otherwise they will be a very big barrier and may cause the breakdown of achieving the vision.

The Deputy Head Teacher was worried about higher management approval for the strategic planning goals and activities.

**Deputy Head 9:** We can agree that lack of co-operation will harm the School Strategic Plan badly, but so far we find a lot of success in welcoming and accepting the vision and mission from inside the school. My concern is the Authority's approval. I think if we could not get their agreement and appreciation we will not be able to implement our strategic plan.

The other Head Teacher was afraid of the lack of financial support from the higher

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management. She thought that was the most important factor in the process.

**Head Teacher 7:** We might overcome the obstacle of the authorities' approval by adequate planning, good communication and determination. However, the most important factor in my opinion is the financial resources; in addition there is a problem with school staff potential and capability.

### **Benefits of school strategic planning**

Several questions were asked in this part of the interview, in order to talk about the significance of school strategic planning such as: "What do you think are the advantages of implementing school strategic planning? Is there any significance to implementing the process at the school level? What are we supposed to gain from conducting school strategic planning?" The Secondary School No. 4 Head Teacher thought that the process had great results, such as focusing the school effort towards the school's future.

**Head Teacher 8:** In my opinion, School Strategic Planning has great results if it is implemented in the right way. For example, school Strategic Planning helps the school to adjust and focus its efforts towards the school's anticipated future and vision in a clear and organised way. All the stakeholders should participate and determine the school direction to achieve the vision and mission. However, the school leader has to insure that there is commitment and motivate everybody to accomplish the school goals.

Her Deputy liked the sense of teamwork that the MSPM helped to create in the school and the minimisation of risks and uncertainty in the decision-making.

**Deputy Head 8:** What I like in school strategic planning is that it gives the school

the sense of teamwork, and to align the school with its environment. Moreover, school strategic planning might minimise the risks and uncertainty in the decision making as to how the school works.

The Elementary School Head Teacher mentioned that the Strategic Planning Model could create a framework for achieving school improvements in an ongoing way.

**Head Teacher 7:** I believe that it is enough that strategic planning provides the school with a framework for achieving improvements for the benefits of the students. In addition, because this process is an ongoing one, it helps to give the school continuous progress.

The Deputy thought that the process in the school helped in motivating everyone to reflect creatively on the direction of the school vision.

**Deputy Head 9:** I think the sharing and participating part was very important. We have seen that School Strategic Planning encourages every participant to reflect creatively on the direction of the school vision. Therefore, we got fabulous results in terms of new programmes and activities that benefit the students and teachers.

### **The effect of school strategic planning**

The two Head Teachers of the No. 4 Schools agreed that strategic planning reduced the uncertainty and risks in doing school activities, because everyone would be aware of the main goals and objectives, in addition to the participation in the decision-making process.

**Head Teacher 8:** Yes, I agree with this view; mainly because the teamwork made everyone aware of the main goals and objectives.

**Head Teacher 7:** Yes; because everyone has contributed to the decision-making process.

The interviewer thanked everyone for their great participation in the study, hoping that they would succeed in achieving their school vision.

## **Analysis of Case Study Findings**

These are the general findings of the interviews analysis that occurred in the Higher Management interviews and the twelve schools in Saudi Arabia before and after implementing the suggested school Strategic Planning model.

### ***Type of planning***

The study found that almost all the schools were using short-term planning. Among all the schools that were involved in the study, only Elementary School No. 1, which had already introduced the Strategic Planning Model, had a school vision and mission statement. The Educational District in Makkah had a strategic plan for five years; however, all the schools had annual plans for each academic year. Few schools had a plan that concerned all the school activities for all the school staff, but the majority had a head teacher's plan, providing lists of everyone's responsibilities and duties during the school year. Just one school had plans for future school improvements.

### ***Experience in strategic planning***

Out of the school staff interviewed, only three had some direct experience of school strategic planning, these being the staff from Elementary School No. 1, who had put their school vision into action almost three years previously. The answers of the staff from the other eleven schools revealed that they did not have any experience of the process, but some tried to give different definitions of strategic planning. The senior management personnel were well-informed about strategic planning and experienced in planning processes, but did not normally consider that as a concept it could actually function in a

single school: they understood it as something that existed at department or regional level.

### ***Meaning of strategic planning***

The participants' responses gave different perceptions about strategic planning. A number of the school staff had only vague information about the subject and their answers revealed that they knew very little about it. Some of their definitions were far from the known meaning of the notion, which suggested that they had very little or no information about school strategic planning. Some of the answers revealed the fear of the word *strategy*; others tried to give wild guesses. However, other answers were in some ways near the meaning of the term strategic planning as generally understood in the literature. One of them thought it was the first step to modernising our school system in order to get along with the new generation; while another thought that strategic planning targets were greater than tactics. One of them talked about the school vision as a tool of measurement that directed them to achieve their tasks and make all the school stakeholders united in the same way. Another thought it might be reaching objectives in an organised way, while one more thought strategic planning was a wise plan that accomplished specific targets. Many described strategic planning as good preparation for something in the future.

### ***Luxury or necessity?***

The study found that all the school staff interviewed acknowledged the necessity of strategic planning at schools. All of them stated that school strategic planning was not a luxury activity. Most of them predicted that school strategic planning could help with school improvements, achievements and better outcomes.

### ***The need for school strategic planning***

All the school staff who were interviewed recognised the need for strategic planning at school. All of them welcomed and encouraged training and wanted enough information about strategic planning to be given to schools or administrators in the Educational District. Most of them thought that school strategic planning could help with school improvements, good achievements and future quality outcomes.

When they were asked if they would welcome attending a course if it was offered to them in order to acquaint themselves further with the Strategic Planning process, all of them liked the idea and were ready to attend the course. Additionally all of them mentioned that they would agree straight away to attend such course if it was free and during school hours. Some of them were prepared to pay a reasonable amount of money if the course was offered outside school hours.

They said they needed school strategic planning because of its benefits to school and students. Their reasons were different; some said they needed it for the purposes of progressing and school improvement, some said that they needed this information to improve their ability to plan in order to achieve the school goals, and some thought that it was important to improve their school performance and to get better educational outcomes. The private schools' participants thought that they needed school strategic planning to cope with the Company's vision.

### ***The application of strategic planning in Saudi Arabian schools***

The level of applying strategic planning in the educational field was one of the major argumentative points among the higher management personnel in the study. One

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participant supposed that the schools and the Ministry had a planning crisis and a lack of planning culture, he thought that the Ministry's plans were just sets of activities or tasks which were programmed in a given time and they called it a plan; however he did not suggest that this would be solved by individual schools conducting their own strategic planning. Another thought that the school's role as an operational unit in the Ministry of Education might limit the validity of an independent school vision. Finally, they agreed that it was possible for school strategic planning to be implemented in schools, but the plan must be compatible with the Educational Policy of the Kingdom and the Ministry's plan, in addition to emerging from the General Educational District's vision. Therefore, in their view, the order of implementing the process of school strategic planning should start from the Ministry of Education, and after that it would be possible for the various departments or districts to create their strategic plan that would be compatible with their potentials and different capabilities. Accordingly, schools or head teachers could then put forward their plans and vision that were not inconsistent with the Ministry's aims. Some of them thought that it was possible that the opposite could happen, where the schools could begin the development and create their own visions and plans, and then the process would move to the Departments and the Ministry; but there was not a general acceptance of this view.

### ***The adoption of school strategic planning in Saudi Arabian schools***

The study found that most of the school staff participants held the Ministry of Education responsible for not applying school strategic planning in Saudi Arabia, while it was being applied in many developing nations such as Kuwait, UAE, Malaysia and Singapore, not to mention the U.S.A. U.K. and Canada. The answers revealed their need for knowledge about the new notion and the lack of attention from the Higher Management at the

Ministry of Education or the Educational District and their centralisation system, as if they were waiting for orders to come from above to implement such process in the schools. Noticeably, most of them referred to the Ministry of Education. There were answers such as: “maybe they were not convinced by the idea; maybe they tested it somewhere that we did not hear about it, or perhaps the experiments were not successful. Maybe because it was not presented to them until now; maybe because the people in the Ministry of Education were trying another programme which was similar to the OFSTED inspection procedures; maybe because strategic planning was not among the priorities of the Ministry.” These answers revealed their dependence on the Ministry’s instructions and orders, or lack of knowledge about the process; they were guessing, while others asserted that the causes of not adopting school strategic planning in Saudi schools were: lack of interest, lack of acceptance, lack of awareness, lack of training, and/or the fear of the word strategy.

### ***Permission and support to conduct school strategic planning***

Should schools seek permission and approval before the start of the strategic planning process, or after they have worked it out and have something to present to the officials?

By and large, most of the Higher Management personnel assured that they would support a school strategic planning process, if it was fulfilling the Saudi Educational Policy and the Ministry of Education’s ambitions. They confirmed that the school should notify the Educational District before the beginning of the process, and submit the final project for the Authority to grant permission and approval, before beginning the action plan. Most of the Higher Management Personnel concentrated on the point of the co-ordination between the school and the District during the process.

They highlighted the need for a qualified team leader to conduct the project, and they re-emphasised that the plan should be compatible with the Ministry's regulations and instructions. They said that they would support the plan if it succeeded in maintaining the Kingdom invariables. Moreover, they would help the schools in achieving their vision and goals to all capacities and possibilities, if the plan did not contradict with the Saudi General Educational Policy and did not have any factors against the security of the country.

### ***The effect of school strategic planning***

Most of the school staff interviewees' feedback about conducting the school Strategic Planning Model and choosing their own vision in the school was very optimistic and positive. They were proud about the school vision, because they experienced several constructive changes in their students' and teachers' behaviour, activities and outcomes. Nevertheless, they mentioned also that these encouraging results did not come right away, but they needed time and lots of effort to be achieved. Some thought that the school vision had changed the students' behaviour for the better. Others thought that strategic planning reduced the uncertainty and risks in doing school activities.

### ***Benefits of strategic planning***

Some of the school staff participants regarded having a school vision and mission statement as a valuable benefit of the MSPM in their school. Making outstanding progress towards achieving the vision and the mission statement, which made the school community united and working in the same direction, was another important benefit of school strategic planning. The sharing part and being able to contribute to the decision-making process were also felt to be noteworthy benefits of school strategic planning. The

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MSPM helped in focusing the school effort towards the school future; furthermore, the process in the school helped in motivating everyone to reflect creatively on the direction of the school vision.

Other participants mentioned several other benefits of the MSPM, such as: a clear school vision which united the stakeholders to achieve the progress they wished to accomplish; the vision changed attitudes positively and gave the school stakeholders some sort of measurement tools that allowed them to keep progressing and working together to fulfil their aims; strategic planning was a reflection of one's work that helped teachers to meet their targets; strategic planning changed the teachers' attitudes positively and made them more disciplined and focused on the vision; strategic planning made the work more organised, the school aware of its needs, and directed all the school activities toward the school mission. Some believed that the MSPM made for a practical school analysis, increased the school allegiance, and captured everything of the school needs. Others thought that the Model helped to create a sense of teamwork in their school and minimised the risks and uncertainty in the decision-making process; additionally, strategic planning could create a framework for achieving the school improvements in an ongoing way.

### ***Specific difficulties in implementing the MSPM***

After conducting the workshop, most of the school participants believed that school strategic planning was not that difficult, not as they had expected. They thought that the Model was easy, clear, understandable, and it was applicable with some time management. Some of them preferred the presence of a qualified person as a facilitator during the planning project.

The interviewer asked them which steps needed further explanation or clarification? The answers were largely as expected, because the new terms were unfamiliar. Most of the school staff were hearing about vision, mission, strategy, and the SWOT for the first time. They thought that the steps were clear and self-explanatory, apart from SWOT analysis. Most of them did not differentiate between the strengths and opportunities since these were positive points inside or outside the school. Likewise, a lot of them found it difficult to tell the difference between the weaknesses and the threats since they were negative points in the school surroundings.

They were asked about the training period, as to whether or not it was, in their opinion, sufficient. They agreed that twenty hours in training and workshop sessions were enough, although some of them suggested that the training session should be outside the school hours in order to encourage the team by giving them overtime salary. Moreover, they mentioned that changing the school schedule to provide the right time for the group was not easy during the school hours for the teachers and the students.

### ***The obstacles, limitations and problems of school strategic planning***

These were important topics, as the aim of the research was to identify the problems and difficulties which might arise in implementing the MSPM in these schools. These problems can be summarised in three stages: problems discovered during the initial interviews; problems revealed during the workshop sessions; and problems found during the writing of the action plan.

#### **During the initial interviews:**

Only a small number of the school staff participants had any information about strategic

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planning. The notion of school strategic planning was unknown, and was out of the ordinary day-to-day practice in the school by teachers and stakeholders. The idea of such planning as the job of Higher Management departments only was one of the barriers to school staff accepting to implement the MSPM in the school.

The General Director of Makkah Educational District expected that there would be genuine and circumstantial impediments to the application of strategic planning at schools. He said that the construction using the term 'strategy' was the problem, because most people were frightened by the word strategy. There was no equivalent Arabic word for this term. The Deputy Director of Makkah General Educational District described planning as 'a dark valley' in Saudi schools, therefore they should build an intensive training programme for all the stakeholders in order to be successful in strategic planning. The Manager of Planning and Development Department of Makkah Educational District agreed to the latter opinion, and he added that planning was still frightening to some people, and they had a planning crisis. The Director of Educational Supervision Centre at Southern Makkah thought that the Head Teacher was the key person in the school strategic planning process: the Head Teacher should be well trained to master this skill, or he would be our major concern. The Chief of School Administrational Supervision Unit of Makkah Educational District mentioned four factors as barriers to school strategic planning in Saudi schools: the school being an operational unit; the lack of time to conduct the project; the shortage of trained school personnel; and the weakness of the existing planning culture. That was the picture of the obstacles to strategic planning from the Higher Management viewpoint during the first interviews. Other impediments to the implementation of the school Strategic Planning Model from the schools' point of view, at this stage, were: the

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school daily work pressure; the shortage of school staff; staff instability; lack of awareness; and lack of desire to learn something new.

Financing the MSPM activities that needed extra budget and resources was a major concern in every school. Moreover, change resistance as a barrier to the strategic planning process was a major concern in schools and at the District level, especially when it was perceived that some had a fear of losing their power and authority.

Another main worry was gaining approval or permission from the authorities to conduct the school strategic planning process. Any contradictory instructions from the Ministry of Education or the Educational District would be considered as a great obstacle to the implementation of school strategic planning. Some school administrators were afraid that they would not be able to change anything fundamentally; furthermore they thought they did not have the right to implement their own strategic plan separate from that of the Ministry of Education and the Educational District. Some thought that one of the most important obstacles to school strategic planning was the centralisation system in the Ministry of Education. This system might cause the disapproval of their strategic targets, in addition to the delay or shortage of financial support.

In addition, some thought that getting the authorisation to conduct strategic planning would need a long time. Besides, the Head Teacher's time in any school could be shorter than the strategic planning time, "less than five years," and therefore he would not be able to finish the whole course of targets and goals.

***During the workshop sessions:***

Once the MSPM was underway, the concerns were mainly about the practicalities.

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Forming the Strategic Planning Team and finding the amount of time needed for the workshop was a big concern at every school. Organising the right time to suit every one of the Team was one of the largest difficulties in beginning the Strategic Planning process in the school during school hours. The Head Teacher had no power to force anyone to take part outside school hours; he had no authority or budget to give them overtime orders or money. Therefore he had to co-ordinate between some of them and re-organise the school schedule, to allow the selected teachers from each department, or sometimes any teacher, to attend the workshop.

The Strategic Planning Team's ability and desire to participate in such a project were very important, and ensuring them was a crucial task for the Head Teacher. While some of the Team members were hesitant to participate, others had a strong effect and power over the decision-making process. The Head Teacher's responsibility to communicate with the stakeholders in order to achieve the higher management's goals and objectives was also very important, as was his ability to get the approval and agreement of the plan goals and objectives.

While conducting the school reality analysis during the training workshop on the MSPM, SWOT analysis was an argumentative point among the participants. Some of them found it difficult to differentiate between the strengths and the opportunities. Likewise the difference between the weaknesses and the threats was not clear for many of the participants. It needed more time, effort and examples to put everyone on the same ground.

Stating the school goals and objectives was a critical step also. The differences between goals and objectives and the formation of the SMART Objectives for the school had to be

fully explained, before arriving at the final school goals and objectives.

Several participants thought that it was difficult to decide on selecting the school targets and objectives according to their abilities. They had to make a cautious decision about the right objective statements according to their priorities and to choose an achievable deadline time.

### ***Writing the action plan***

The balance between the action needed and the school's abilities in order to accomplish the school vision in a proper manner needed to be considered realistically. All the Strategic Planning Teams had a lot of arguments and long negotiations about the actions needed to achieve the goals and objectives. It was a difficult decision for some of them when they tried to identify the appropriate action and activity in order to achieve their objectives. The difficult part was to find the right action that matched the school's abilities and financial status.

It was very important to explain the criteria for the decision-making process during this step. Questions such as: "Who determines abilities and priorities? On what basis do we make our decisions? To what extent do we have to be flexible in this manner?" Those questions had to be fully explained and described before writing the action plan.

Similarly, it was very important to be specific and clear about what the evaluation procedures on every action and school activity were. All the participants agreed upon the importance of the evaluation step, which could limit the benefit of the process if it were not implemented correctly.

### ***Rural, private and girls' school vs city school***

Most of the families in the rural school did not usually give too much attention to school activities; the people in the local community were busy with their demanding daily lives. Hence, the students' guardians' participation in the process was limited, as expected. An additional difference between the city school and the village school could be noticed in the school analysis: what could be considered as a weakness in the school building or student behaviour in the city school could be measured as a normal character or behaviour in the village school. For example, the absence of fast internet connection or weak electric power was considered as normal in some remote village schools. Similarly, students talking to the teacher loudly could be considered sometimes as normal student behaviour in some rural schools, while it is not acceptable to do so in a city school.

One of the private schools' characteristics was staff instability. There were several Saudi teachers in the private schools, but these teachers (in both the male or female schools) did not last for more than two or three years at most. They worked in the private school in order to get some experience in teaching while waiting for the government job where they would be more secure, and have a higher salary. This instability in their staff meant that the private schools needed much more organised follow-up procedures, to prevent cutting the activities or the actions needed to accomplish the school targets during the strategic plan period.

An additional dissimilarity between the private schools and the governmental schools was the Strategic Planning Team's commitments and the level of change resistance. The private school staff accepted more commitments in general, because staff could be easily changed, and maybe dismissed from the school; as a result, there was less change

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resistance in the private schools.

### ***Differences between the stages of education***

There were no obvious or significant differences observed between implementing the MSPM in the different school stages; this may have been because the study was dealing with head teachers, teachers, administrations and stakeholders. If the research had involved interacting only with students the results might well have been different.

However, the researcher found that the strategic planning teams were more enthusiastic and dedicated in the elementary and middle schools studied than in the secondary schools. Moreover, the girls' school staff were always on time and willing to talk and participate in the process. The action plans, of course, were not the same in each school and varied according to the demands and objectives of each stage. The study selected dissimilar situations (city schools, village schools, private schools, and girls' schools) in order to cover all the types of schools in Saudi Arabia to show the applicability of the Makhdoom Strategic Planning Model (MSPM) across a broad range of school situations

### ***Summary***

The case studies have revealed that, although the experience of implementing the MSPM in the twelve schools was overwhelmingly perceived as a positive one, some obstacles and problems did emerge. Some were specific to the situation of schools in Saudi Arabia, and some were more general barriers which would need to be considered by any school or organisation which was intending to use the suggested Model. These will be discussed further in the final chapter.

## Chapter Seven - Conclusion and Recommendations

### Introduction

As the notion of school strategic planning can be considered a new concept in the educational field in Saudi Arabia, the **research aim** of this thesis was to investigate the possible problems raised as a direct result of implementing the MSPM in schools in Saudi Arabia.

### *The research objectives*

The research objectives introduced in Chapter One have been achieved by the study.

They were as follows:

To examine and review possible appropriate strategic planning models for implementation in the smallest education system units (schools) in Saudi Arabia. This objective was achieved in Chapter Four.

To identify the problems that may arise as a direct result of implementing the suggested school strategic planning model. This objective was accomplished in Chapter Six and will be summarised in this chapter.

To recommend ways in which any problems can be overcome. This was partially addressed in Chapter Six and will be completed in this chapter.

To identify those areas where school autonomy is possible and those where schools are

obliged to implement government policy. Likewise, this objective was partially accomplished in Chapter Six and will be further defined in this chapter.

### ***The research questions***

The research questions were also answered through Chapter Six, which analysed every interview that occurred in the study, and the questions will now be used to summarise and conclude the findings of the research.

### **Can the MSPM be implemented in the Saudi educational smallest units in the system (schools)?**

Clearly, implementing the Model in schools is possible, as all twelve case-study schools succeeded in implementing it. All the schools were successful in creating their own vision, mission statement and action plans, and participants found putting the MSPM in place to be a positive experience. Furthermore, the twelve schools in the study were selected to form a representative sample of Saudi schools; they were chosen to include different communities and situations: city, village, boys, girls, government-owned buildings and rented buildings, state school and private school. Therefore it is a reasonable assumption that the MSPM could be implemented in any typical Saudi school, and in comparable schools in other countries.

However, whether it can be successfully implemented in all schools in Saudi Arabia will depend on how some of the problems identified are addressed, for example the need for more information and training and the need for approval and support from education authorities.

**What are the potential challenges posed by the implementation of the MSPM in those schools?**

As detailed earlier in this study, various challenges were identified:

Lack of awareness and understanding of the concept of strategic planning, and anxiety about the word 'strategy';

Fear of losing some authority or fear of losing power;

The habit of short-term planning or lack of a planning culture;

Fear of change;

Fear of doing the wrong thing and going against the Ministry or District policies;

Lack of time, qualified personnel and resources within schools.

**What are the possible problems that arise from implementing the MSPM?**

The schools generally found the Model easy to apply once they got started, but there were areas where problems arose:

Participants emphasised the need for the school Teams to fully understand the process; most of the school Teams had problems with the SWOT analysis, for example, and appreciated having a facilitator to clarify the concepts for them. If the process is badly understood and carried out, the plan may not be achievable or useful.

The leadership of the Head Teacher was clearly seen in the case studies to be of vital importance; however, not all Head Teachers remain at schools for very long. New staff

arriving during the middle or later stages of the plan could undermine its effectiveness if they were not committed to the process and informed about it.

Co-ordinating school planning with the education authorities remains a subject for debate. Problems may arise if schools decide on a vision or mission statement which is not in accordance with the Ministry's policy, or if the District Higher Managers feel that the school has not sought approval in the right way.

**What is the impact of those problems on the feasibility of implementing the MSPM in schools in Saudi Arabia?**

If schools conducted strategic planning in an ill-thought-out way, or failed to finish all the stages of a plan, or neglected to obtain the appropriate approvals, the concept of strategic planning could be discredited, and the school in question would not benefit from the process. Head Teachers who have made minor modifications to the school arrangements without permission have had those changes undermined by instances of negative feedback or envious reports to the Ministry of Education.

**To what extent could these problems affect the successful implementation of the model in Saudi Arabian schools?**

These problems could add to the change resistance and fears already mentioned.

It is even possible that education authorities could decide that schools cannot be trusted to set up their individual plans. The Higher Managers interviewed were not all in favour of strategic planning at school level.

### **How can the Strategic Planning Team in each school overcome these barriers?**

It is clear from the case studies that schools must be careful to overcome each of the barriers in order to benefit from the planning process. However, the reactions of participants and the experiences of the schools suggest that this can be done, if the following precautions are observed:

Use education and training to overcome fear of change.

Choose a capable Planning Team and make sure they have the time and resources available to do everything they need to do.

Make sure there is participation in decision-making and in forming the vision and mission statement, so that stakeholders feel they are valued and are committed to the planning process.

Ensure effective leadership from the Head Teacher or a Deputy.

Have a facilitator who can explain anything in the process which the Team is not sure about and who can help the Team to be clear and rigorous about targets and priorities.

The school should not go too far from its capabilities but make sure the plan is realistic; if they cannot reach everything they wanted, they must not give up and leave everything.

Have several alternatives for the actions in the action plan.

Make sure that education authorities are informed at every stage and that all

necessary approvals have been obtained.

Train any new staff who join the school so that they are able to participate fully and no part of the strategic plan becomes neglected because a staff member has left.

### **Attitudes to strategic planning at the end of the study**

The study found that all the school staff participants recognised the need for strategic planning at school. All of them stated that school strategic planning was not a luxury activity; they said they needed school strategic planning because of its benefits to school and students. Many described the strategic planning as good preparation for something in the future: some said that school strategic planning should be the first step to modernise our school system in order to get along with the new generation.

After conducting the workshop and beginning to implement the plan, most of the school participants believed that school strategic planning was not that difficult. They thought that the model was easy, clear, understandable, and it was applicable with some time management, and perhaps the presence of a qualified person as a facilitator during the planning project.

Generally the school interviewees' feedback about conducting the school strategic planning and choosing their own vision in the school was very optimistic and positive. Some thought that the school vision had changed students' behaviour for the better; others thought that strategic planning reduced the uncertainty and risks in doing school

activities. Many of them agreed that school strategic planning could help in the school improvements, good achievements and future quality outcomes.

The Planning Teams participants stated many benefits from school strategic planning: for themselves, sharing in the efforts and contributing to the decision-making process were remarkable benefits of the project. Moreover, they said that the MSPM helped in focusing the school effort towards the school future. They felt that the importance given to vision and values in the MSPM was appropriate and useful for their schools. Furthermore, they thought that the process in the school helped in motivating everyone to reflect creatively on the direction of the school vision.

However, at the end of the study not all views had changed to the positive in this way. The level at which strategic planning should be applied in the educational field was still one of the major argumentative points, and some of the Higher Management personnel remained reluctant to concede that to have schools conducting their own strategic planning was desirable or practical. Some said that the school's role as an operational unit in the Ministry of Education might limit the validity of an independent school vision. Finally, they agreed that it was possible for school strategic planning to be implemented in schools, but the plan must be compatible with the educational policy of the Kingdom and the Ministry's plan, in addition to emerging from the General Educational District's vision. Therefore, they believed that the order of implementing the process of school strategic planning should start from the Ministry of Education, and after that it would be possible for the various Departments or Districts to create their strategic plan that was compatible with their potentials and different capabilities.

Many school participants had asserted that the Ministry of Education was to blame for not adopting school strategic planning in Saudi schools, due to lack of interest, lack of acceptance, lack of awareness, lack of training, or for fear of the word strategy. They felt that there were staff who knew the importance of school strategic planning but they did not know how to start, and/or they needed approval from the higher authorities and they did not know how to get it. The Higher Management personnel assured that they would support a school strategic planning process if it was fulfilling to the Saudi Educational Policy and the Ministry of Education's ambitions, and the plan should be compatible with the Ministry's regulations and instructions. In addition, they highlighted the need for a qualified team leader or facilitator to conduct the project.

It can be argued that there is no need for any major conflicts or problems between the Ministry of Education, the Higher Management and the schools' autonomous strategic plans. As long as a school's strategic plan emerges from the Ministry's goals and is in line with the Ministry's vision, the school can act freely and go ahead with practical procedures, and can request the proper support for its progress and improvement needs. In this way, every school's plan and vision will be different from those of other similar schools in other neighbourhoods or cities, because every school is different in its needs, abilities and possibilities; but the overall goals and vision will all be in tune with national policy. Another benefit of school strategic planning in an atmosphere such as Saudi Arabia, with its centralised system, is that each school, instead of coming back to the authorities every time it needs approval for any change or development, can make its plan and get the approval for all the changes that will be needed through the four or five years of the plan.

The new notion of school strategic planning was realised by all the school participants as a necessary step towards school improvement. Moreover, they all agreed that the Head Teacher's part in the process was crucial in keeping the feeling of enthusiasm and energising the school staff towards achieving the school vision and accomplishing the school mission statement. The results demonstrated that the School Head Teachers had the ability to resolve and overcome any obstacle with wisdom and patience, besides conducting many meetings to ensure the Team commitments and the follow-up procedures.

It was noticed from the interviews that the major obstacles to implementing school strategic planning were fear and resistance to change. To some extent these were still present at the end of the study. The higher management of the educational system were scared of the new notion, expecting that they would lose power or authority. Some thought that an individual school Strategic Planning Model could be the first step to decentralising the educational system gradually. At the school level, people were frightened of the centralisation in the educational system and worried that they might be restricted or might do the wrong thing. The way forward, therefore, must involve good communication, awareness and respect on both sides in order to overcome both the fear of the planning strategy concept and the resistance to change in the educational status quo. Spreading the strategic thinking culture through the educational system in Saudi Arabia should overcome most of the support and approval difficulties and reduce the impediments to implementing school strategic planning.

### ***Limitations of the study***

Although the author believes that the research findings of this study are important and a great deal of effort was made to accomplish the results, several limitations should be noted.

The study was necessarily limited by the use of twelve representative case studies in Makkah, due primarily to constraints of time and funding.

Despite diligent efforts in translating the interview questions from English to Arabic and the dialogue from Arabic to English, the possibility exists that some of the original meaning may have been lost in this process.

Because of the complete segregation of education between boys and girls and the strict cultural constraints operating in Saudi Arabia, the study managed to visit just one combined girls' school.

Before beginning this research, the MSPM had previously been tested empirically in three schools, but had not been implemented in a wider range. It was therefore still in an experimental stage.

The time designed for writing the action plan was very short; therefore each school had few chances for examples and alterations.

### ***Contribution of the study***

The value of the research is that it sheds light on previously ignored academic and

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strategic management issues such as the importance of utilising strategic planning in schools in general terms and in the Saudi education system in particular.

The research aims to contribute towards and extend understanding of the value of strategic planning in the context of the Saudi Arabian education system at school level.

The research aims to contribute towards and extend the body of knowledge and to fill the academic gap on the content of school strategic planning and its relationship to school improvements together with academic and administrative achievements.

It is argued that in Saudi Arabia, the school strategic planning process can play a very important role in the development of the Saudi education system, thus enabling Saudi educators to utilise modern western management techniques and practices in pedagogy.

Principally, this study will be the first in the area of school strategic planning within the Saudi context. Therefore, it can be argued that completing this research successfully will contribute immensely to the school strategic planning debate in Saudi Arabia.

The author contends that the findings of this study are generalisable both to schools in Saudi Arabia and to the wider world. As mentioned above, the schools in the study were chosen to be a representative sample of Saudi schools, and the experiences of the participants in the study can be considered to be typical of how school staff in Saudi Arabia would be likely to respond to implementing the MSPM. Since the Saudi education system is centralised, there is great similarity between schools all over the country. The problems encountered by the sample schools would be likely to occur in any ordinary Saudi state or private school, and the benefits described by the interviewees would also probably be described by the staff of any other Saudi school

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which decided to use the MSPM for its own strategic planning.

Furthermore, while this study is specific to Saudi Arabia, the case histories and interviews present attitudes and problems which will be familiar to those working in education in other countries, and indeed those working in other fields. The values of strategic planning, the usefulness of the suggested Model, and the problems to be dealt with, are all elements of this research which can be applied to other situations in education, as well as other organisations in public service and elsewhere.

As described in Chapter Four, the particular strengths of the MSPM are that it is a circular process, which keeps its users constantly in touch with their vision and regularly renewing their efforts to make improvements; that it is a simple and easily understood ten-step model; and that it is vision-led. These attributes make the MSPM an advance on earlier strategic planning models. They also make it a suitable model for use in schools in any part of the world, and in other organisations, such as healthcare services or charitable bodies, where the importance given to values, and especially the focus on vision as the beginning and end of the planning process, would be appropriate to their work.

The study therefore offers a way forward for Saudi schools which can give them greater autonomy and efficiency as well as a greater sense of mission, and it also presents a new strategic planning model which can have a wider application in education and in many different kinds of organisation worldwide.

### ***Suggestions for further studies***

This research project and its findings should not be the end of the subject. It should be used as a starting point or framework for future and advanced studies, on topics such as: the use of the MSPM in schools in other cities in the Arab countries; the differences and similarities between different stages in implementing school strategic planning; the differences and similarities between boys' and girls' schools in implementing school strategic planning; the problems involved in implementing the Model in a college or department in a university in Saudi Arabia or any other country.

It would be useful to initiate a networking group between the twelve schools in the study, so that they could discuss the effects of their strategic planning between themselves. A follow-up study of the twelve schools after three years could yield valuable insights.

The MSPM itself can be used as a basis for further discussion and discourse and its wider application can be studied, whether it is implemented in schools in other countries or in different kinds of institution both within and outside the field of education.

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## **Appendix 1 - Research Documents**

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## ***Consent to participate in research***

**Project Name:** An Investigation into the Problems Involved in the Implementation of a MSPM for Schools in Saudi Arabia.

**Investigator:** Ahmad M. Makhdoom      **Email:** [makhdoom\\_ahmad@yahoo.com](mailto:makhdoom_ahmad@yahoo.com)

### Introduction

You are invited to participate in this research study. I will be looking at the Problems Involved in the Implementation of a MSPM for Schools in Saudi Arabia. This form will describe the purpose and nature of the study and your rights as a participant in the study. The decision to participate or not is yours. If you decide to participate, please sign and date the last line of this form.

### Explanation of the study

I will investigate the impact of the possible problems raised as a direct result of implementing a MSPM in school in Saudi Arabia. I am interested in knowing what the possible problems that rose from implementing the MSPM are, and to what extent could these problems affect the successful implementation of the model in the Saudi Arabian Schools. Furthermore, how can the strategic planning team in the school overcome these barriers?

All members of the school staff (administrators, teachers, parents) are welcome to participate in this study. I will carry out initial interviews, training sections and observations in order to have an in depth look at possible problems raised as a direct result of implementing a MSPM in the school. Each interview will be tape recorded and will take no more than half an hour of your time. You will be invited to attend and

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participate in one day training workshop about school strategic planning. The final questionnaire will take no more than fifteen minutes of your time.

#### Confidentiality

All of the information collected will be confidential and will be used for research purposes only. This means that your identity will be anonymous, in other words, no one besides me (the researcher) will know your name. Whenever data from this study are published, your name will not be used. The data will be stored in a computer, and only the researcher will have access to it.

#### Your Participation

Participating in this study is strictly voluntary. That means you do not have to be part of the study. Your decision to participate will in no way affect your status in the school. If at any point you change your mind and no longer want to participate, you can tell me directly. If you have any questions about the research, you can contact me by email [makhdoom\\_ahmad@yahoo.com](mailto:makhdoom_ahmad@yahoo.com) or in person at 07748975441

#### Participant's Consent

I have read the information provided in this Informed Consent Form. All my questions were answered to my satisfaction. I voluntarily agree to participate in this study.

**Your signature** \_\_\_\_\_ **Date** \_\_\_\_\_

Adapted from: Mackey, A., & Susan, G. M. (2005). *Second Language Research Methodology and Design*. New Jersey: Lawrence Erlbaum Associates Publishers.

### ***The initial interview questions***

Q1. What kind of planning, if any, does your school operate? Short – term; (Day or week); Middle – term? (Term or year); Long – term? (Three to five years)

Q2. Have you any experience of strategic planning?

If the answer was yes, then the following questions were asked.

Q3. What does school strategic planning mean to you?

Q4. From your point of view, what are the benefits of school strategic planning?

Q5. What are the limitations of school strategic planning?

Q6. What are the barriers to implementing strategic planning: In general and at your school?

Q7. Do you think that strategic planning for any school is a necessity or a luxury?

Q8. Do you think that every school needs its own strategic plan; and why?

Q9. From your point of view or your experience; why is strategic planning not adapted in Saudi Arabian schools?

Q10. If you offered a workshop in school strategic planning, would attend the session?

However, if the answer to question number two was NO, then the following questions were asked.

Q3. In your opinion, what do you think strategic planning is?

Q4. Do you think that you need to know more about strategic planning; and to what extent?

Q5. Don you think that you need to implement strategic planning in your school for the purposes of better performance?

Q6. Do you think that every school needs its own strategic plan; and why?

Q7. Do you think that strategic planning for any school is a necessity or a luxury?

Q8. From your point of view or your experience; why is strategic planning not adapted in Saudi Arabian schools?

Q9. What are the barriers to implementing strategic planning: In general and at your school?

Q10. If you offered a workshop in school strategic planning, would attend the session?

### ***The final interview questions***

Q1. In your opinion what is the appropriate way to do this process? Must the ministry begin its strategic planning process, then it moves to the departments, then to the educational centre and finally to schools; or the opposite should be happening ?

Q2. How was the reception of the public to your new vision?

Q3. Did they have any questions, opinions or comments on the subject or planning in general?

Q 4. Was it difficult to apply the MSPM?

Q5. What do you think are the advantages of implementing School Strategic Planning?  
What are the significances of School Strategic Planning?

Q6. What are the benefits of strategic planning after being implemented and what do you expect to happen at the school?

Q7. What are the expected problems or the obstacles in implementing school strategic planning ?

Q8. If you remember the ten steps, do they have problems or defects?

Q9. Are there any other impediments to the implementation of the suggested school strategic planning model?

Q10. Is the training duration enough?

Q11. Do any of the steps need any more clarification or explanations?

Q12. What has the school vision provided you with, and what are its effects?

Q13. As for the students, how did the vision change or improve them, have the students become interested in this subject?

Q14. Do you agree that strategic planning reduces uncertainty and risks in doing school activities?

Q15. What has strategic planning done to the school in respect of obligation and cooperation of the teachers?

Q16. How did you use this vision to improve the school?

Q17. What are the problems or obstacles you faced when implementing the strategic planning?

Q18. What is the role of the schools administration in the success of implementing the strategic planning process in the school?

Q19. What are the problems expected to occur when implementing strategic planning?

Q20. Do you expect any problems from the student or their guardians in the implementation of the strategic planning?

Q23. Would obtaining permission from the Educational District to conduct school strategic planning consider an obstacle in implementing strategic planning at school?

Q24. Do any of the steps need further explanation or clarification?

Q25. Do you agree that the strategic planning decreases the doubts and dangers in the performance of the work at school?

Q26. Do you think that strategic planning contributes in the benefit of the opportunities that could exist in the framework of the school?

Q27. To what extent does strategic planning contributes in uniting efforts at the school to work together in the surrounding environment?

## **Appendix 2 - Research Photographs**

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Schools

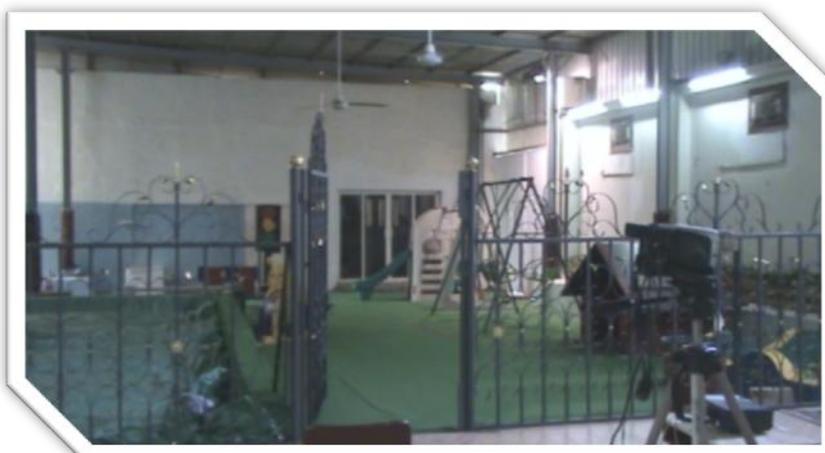
City Boys' School



Village Boys' School



Private Girls School



## Individual Interviews



## Group Interviews



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## Group meetings

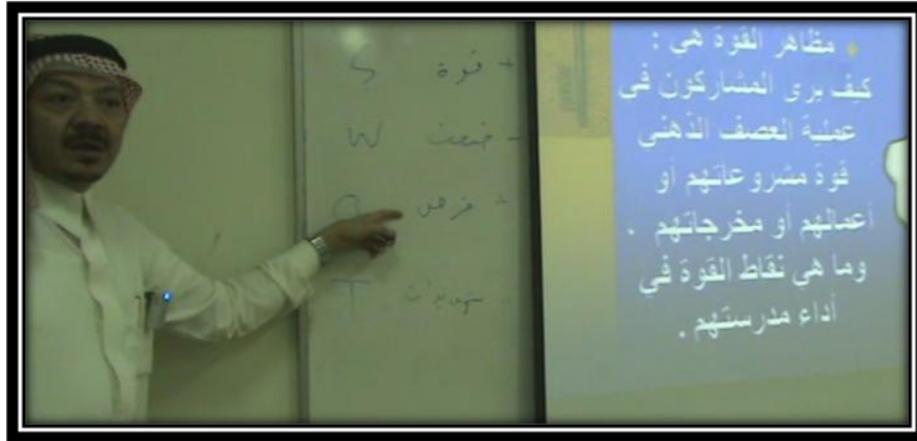


## Introducing the School Strategic Planning Model

### Trainings, Lectures



## Workshops





## Girls' School



Results



