

A Discussion of Strategic Planning as Understood through the Theory of Planning and its Relevance to Education

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ABSTRACT

The purpose of this article is to provide an introduction to strategic planning in education, including basic principles, templates, and factors that led to its rise to become a recognized approach in educational planning, and in the issues that have led to increasing reliance on other approaches to educational planning.

PLANNING THROUGHOUT HISTORY

Planning's beginning is clouded in a history that extends backward for at least seven millennia, and, perhaps, depending on one's definition and semantics, 100,000 years. If an ancestor, on picking up a stone, saw in that stone a spear point and proceeded to shape the stone so as to bring out that spear point, was this an act of planning? Although it may not be understood as such, everything people do is plan based. This does not mean that people always create a formal plan. Does one even need to comprehend planning to plan? Whatever the answer, one who is planning may or may not understand what planning is. So, historically, planning really has no known beginning.

So what is planning? It is best considered to be a design process by which a plan, model, or template is developed that guides future actions to achieve a goal(s). It is not just strategic planning. As this article will explore, strategic planning is but one form among several forms of planning.

However, the design process and its output, the plan, are often confused. This is a result of the process and the plan being simultaneously undertaken and essentially viewed as the same thing in a situation where the intent is to create one plan and use it once. This is generally the situation, but not always. With more complex approaches to planning evolving over time, the understanding grew that planning is only one element in a series including implementation and institutionalization that creates a process of organizational change and reform. In education, various categories of templates or models exist for dealing with concerns related to different goal achievement issues. Planning's historic emergence is germane to this discussion where, rather than only strategic planning, the more intricate design of plans with different methodological approaches should be understood.

So, we tend to begin any discussion of planning history with something that has been created physically, is recognizable, and is to some extent enduring. Buildings are a good starting point in that they obviously require some basic reasoned planning. One of the first buildings built that most assuredly called for cognitive planning was the structure known as Barnenez in France in 4850 BC (*Barnenez*, n.d.). Note that this large stone building is twice as old as the Parthenon. In 2560 BC, the Giza pyramid of Cheops was constructed -- at 20 times the mass of the Empire State building. Serious planning certainly was involved.

Planning began to receive strong emphasis in the management literature with both Frederic W. Taylor (1911), an American engineer publishing *Principles of Scientific Management* that proposed the establishment of planning shops in factories as a means to create greater organizational efficiency, and in 1916, when Henri Fayol (1916, 1949), a French mining engineer, wrote *General and Industrial Management*. In this book he stressed planning as one of the five key roles of administrators. He defined planning (*prevoyance*) as the forecasting of future trends, the setting of objectives, and the coordination and harmonization of the organization's efforts to achieve those objectives. He called for the development of timelines, action plans, and budgets necessary for the implementation of the plan. He also advocated for the participation of various stakeholders in the planning process. The work of both men led to ideas such as increasing organizational performance through better planning, and to the development of tools such as the Gantt chart.

With time, old traditional ideas have been tested and new concepts have emerged. Theory has informed practice; however, to a far greater extent, practice has forced theory into a more field-

oriented posture. Modern educational planning, as considered here, begins around the period of World Wars I and II and is oriented toward managing institutional change. This was a period when soldiers returning home applied much of what they had learned about military planning and many of its related tools. Flowcharts, task analysis, risk analysis, and planning's twin, decision making, along with other planning tools, became known and underwent widespread use. This period set the stage for dramatic growth in the application of planning generally and the expansion of applications of the process in the 1960s and 1970s. The soldiers also brought home a term -- strategic planning.

A simplified graphic including planning and its follow-on activities is illustrated in Figure 1. The illustration is presented in a linear form for clarity, even though most would agree that the process is far from linear, folding back on itself and twisting in response to increased understanding of emerging difficulties and new knowledge. Also, for the sake of clarity and simplicity, the necessary recursive feedback loops are not depicted.

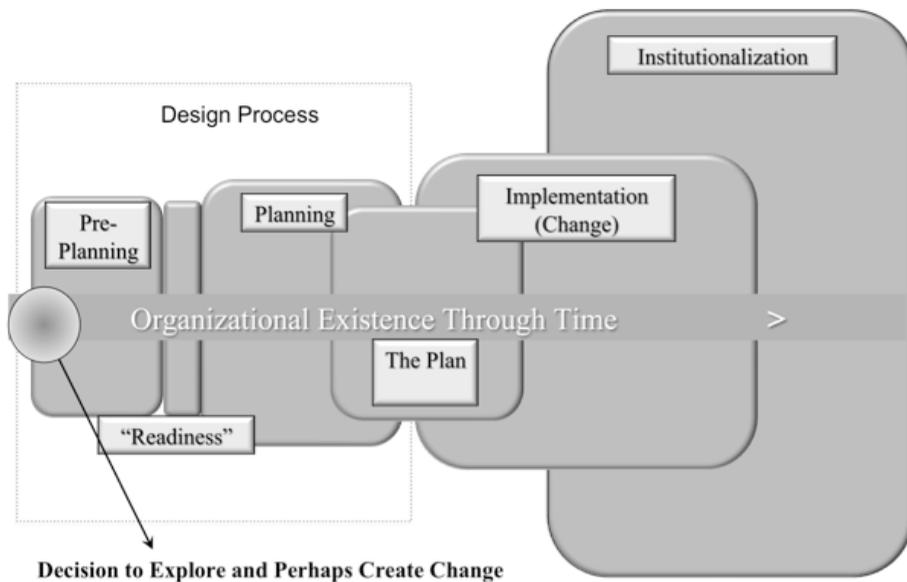


Figure 1. A simple, basic change model.

The model relating to education begins with a pre-planning phase, in which the school determines if a need exists for change and what it might take to effect that change. It examines the nature of the desired changes and determines which planning approach would be the most effective and efficient in beginning a goal achievement process. The process then blends into a readiness phase; there is no clearly defined delineation or separation among the various phases. In the readiness phase, the school examines its capacity and willingness to plan, implement, and institutionalize the proposed change(s). It assesses the scope and reasonableness of change, and administrative support for the change, the organizational culture and climate, the leadership, staff skills and needed staff development, institutional history and current involvement with change efforts, the clarity of the vision, goals, and objectives, the ability to observe the innovation in other settings, access to consultants, and its time constraints. A set of frequently noted potentially troublesome variables is found, further along in Table 1. If these variables, on balance, seem to be positive and are manageable, it moves on to the planning phase.

At this point, attention shifts to forming a clear vision of the change(s) desired and a set of goals to accomplish that vision. The major questions to be answered at this point include:

- Where have we been?
- Where are we?

- Where do we want to go?
- What steps must we take in order to get there?
- What time and resources will we need to take those steps?
- How will we measure our progress or success?

Alternative goals and means for attaining these goals are examined and eventually prioritized. This then leads to the development of the plan.

This phase is action planning and begins with a task analysis. Task analysis is a process of determining what objectives should be set to attain the organization’s goals or to move it forward in the direction of an agreed-upon vision. These objectives are then analyzed to determine what jobs and/or activities are needed to achieve the goals. Once this has been accomplished, the challenge becomes one of identifying the relationships among the tasks. The final activity of task analysis is grouping the tasks into major, conceptually integrated sections of work. Once the task analysis has been completed, the next step in the action planning process is the scheduling of activities and the budgeting of resources to those activities. This eventually allows the planners to develop time estimates, assign personnel, track progress, and understand the scope of the process. At this point the planners should revisit the following questions:

- Can we afford this?
- Will it be worth the cost?
- Do we have the needed skills and resources, or could we acquire them?
- Can we finish in time for the project to produce the desired results?
- Shall we proceed?

The actual action plan often takes a format similar to that depicted in Figure 2.

Sample School Improvement Process Action Plan Format						
Task / Activity	Person(s) Responsible	Begin Date	End Date	Resources Needed	Resources Available	Resources to be Obtained and Sources

Sample School Improvement Process Action Plan Format (continued)				
Task / Activity	Products or Evidence of Progress to be Assessed	Person(s) Responsible for the Assessment	Assessment Methodology	Assessment Due Date(s)

Figure 2. A sample action plan format.

With this plan established, the process moves on to the implementation or change phase, in which the activities of the action plan are carried out and assessed. The progress made in carrying out this action plan determines the extent to which it may be necessary to return to the planning phase, or even to the pre-planning phase, for revisions. If the desired changes are successful and widely accepted among the stakeholders, the school gradually begins to institutionalize them into its climate, culture, and routines.

TYPES OF PLANNING

Not all planning processes are alike. Consider what a quick search for “planning” through the book section of Amazon.com turns up: Facilities Planning, Fiscal Planning, Menu Planning, Party Planning, Project Planning, Town Planning, Wedding Planning, and others. Each type is obviously different and each has at least one commercial publication available. This gives rise to different theories related to the nature of the design process. However, all result from an understanding that the plan should actually be capable of being implemented. The overriding question becomes: Can this plan be implemented? This point addresses the most important cause of planning failures and always must be a concern. Historically, guidance for design processes falls into several different classifications based largely on the various approaches to be used based on implementation, resources, and time. These processes range from tightly management-controlled plans to more loosely people-oriented approaches. There are many philosophies as how to conduct the planning process.

The past century has seen educational planning evolve and develop into a recognized field of study. During this period, many process models, principally four, have been articulated as to how the future of educational organizations can and/or should be changed for the better. The four models are well defined, understood and are sufficiently different from each other that they can be designated as planning paradigms. These paradigms are known as Rationalism, (Comprehensive and Bounded), Incrementalism, Mixed or Environmental Scanning, and Goal Free or Developmental Planning (see Beach, 2004). Each has brought a progression of insights as how the implementation of formal planning can bring about real organizational change. These, as noted, are:

Comprehensive Rationalism -- Simon (1950 & 1965)

Very Goal Driven: Obsolete but Still Found in Use

The earliest articulation of rational planning has become known as Comprehensive Rationalism. In this model, goals and means are clearly defined. A logical series of steps, often linear, is typically proscribed (a generic example can be found at Figure 3). Ends and means are assumed to be separable and capable of eliciting widespread organizational support. The postulates of this theory require that all solutions to the problems of the proposed change are examined and that the best solution be chosen. Simon (1950, 1965) proposed three objections to any pure form of this model. First, can all solutions really be examined? Second, the future consequences of any plan can only be assumed. Third, given human psychological issues such as bounding (limiting the problems parameters), biases, and the form of the problem’s presentation and its framing, memory recall, etc., raise questions as the true rationality of educational organizations.

In reality, the complexities of each school’s changing environment, internal strengths and weaknesses, readiness for change, the requirements of complete comprehensiveness, culture, needs, and stakeholders make this a vastly intricate process. Initially, this was the appropriate template for strategic planning. However, current ideas have made the template more concerned with creating greater stakeholder involvement. This is especially true in education.

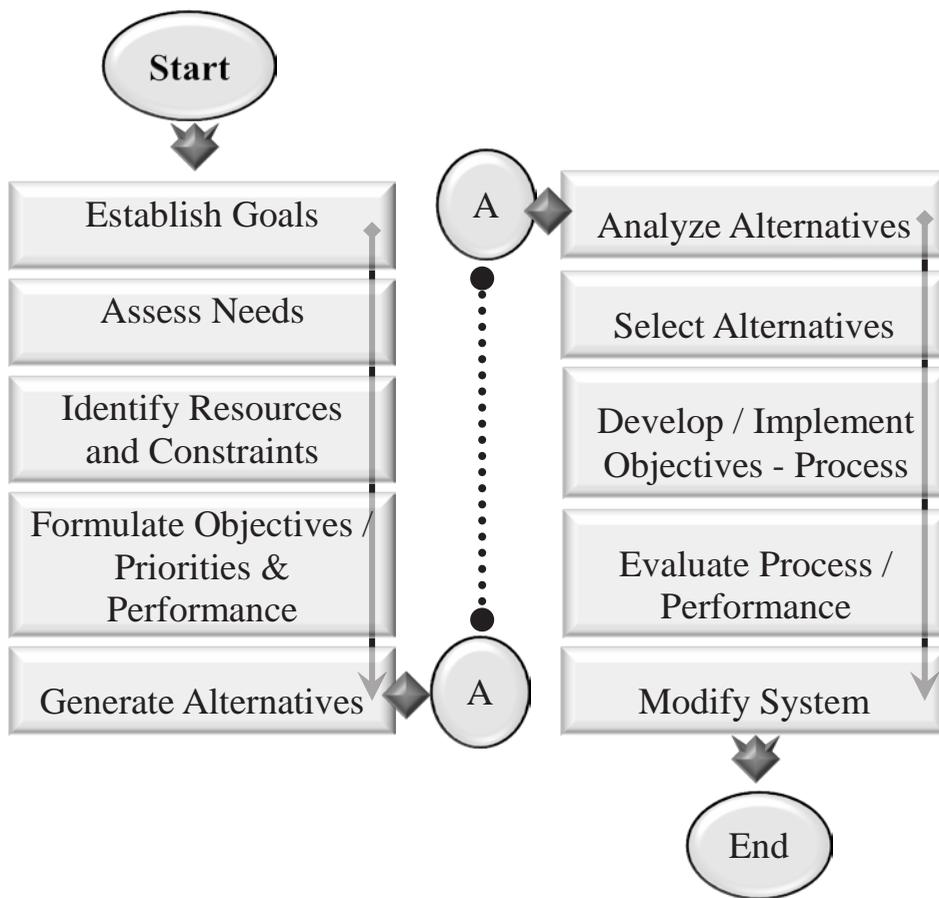


Figure 3. Basic rational planning process format.

Bounded Rationality – March and Simon (1958, 1982)

Highly Goal Driven

Moves to weaken the postulates of pure rationality were made when March and Simon (1958, p. 169) proposed what has become known as Bounded Rationality. This approach to planning recognizes the impossibility of articulating all possible solutions from a potentially infinite set as the means to select the optimum (best) solution: the best always may be the next solution chosen for examination. A feasible solution becomes acceptable. However, even creating and executing feasible plans on an unknowable future is hazardous and the longer the time frame for a plan the more hazardous success becomes, which may explain the near disappearance of what were known as long-range planning models. Bounded rationalism now represents the most frequently used of the rational models.

Although bounded rationalism does restrict the choice of planning models as a means of quality improvement, relative to comprehensive rationalism, this does not free those choices from the problems inherent in all rational models. Instead, it posits that in most cases, attention is best focused on a restricted set of core issues, conditions, and alternatives that lie within the range of feasibility of the organization and its stakeholders. This, again, is not linear and is presented here as a classic step model.

Incrementalism -- Lindblom (1959)

Goal Driven

This model minimizes the amount of information and decision-making needed. Basically, it accepts the status quo as the baseline and calls for small (incremental) advances in the direction of organizational goals. Initially this was known as the model of Successive Limited Comparisons, AKA *Muddling Through*. In this formulation, the planner builds on past and current achievements

and proceeds in small incremental steps. This is viewed as the art of the possible. Global goals are seen as flexible, changing, and achievable only, if at all, by small incremental steps taken in the direction of such goals. The planner may consider past policies and plans and make marginal changes to the ongoing plan for a future course of action.

Mixed Scanning -- Etzioni (1967)

Somewhat Goal Driven

Etzioni (1967) saw the value of combining the concepts of the incremental and bounded rational models in an organization's overall planning process, capitalizing on the strengths of each. This mixed-scanning model reflects Etzioni's recognition that an organization's planning process need not be monolithic. There are aspects of the planning process that may well best be served by the incremental model; however, for other aspects a bounded rational planning process is more appropriate.

Developmental or Goal Free -- Clark (1981)

Relaxed Goals

This model should not be confused with the same term used in national development programs. The developmental planning model is in reality strictly a planning model that focuses less on identifying highly specific, quantifiable, organizational goals and the unified action to attain those goals than on identifying the shared positive values, beliefs, and vision of the organization and then promoting a variety of individual and group efforts that are consonant with those values, beliefs, and vision. When working from a Developmental or Goal-Free model, the planner perceives goals as only one element in the mix of organizational change concerns. To this extent, the process is non-rational in the sense that organizational change is not seen as exclusively achieved through primary goal attainment. Stakeholders will disagree over goals when some individuals are lessened by the impact of those goals. This gives rise to resistance, either openly expressed or held privately by a subset of stakeholders. Rather, the model suggests that by delaying goal formulation, more time is available to resolve tensions and potential goal conflicts by their adjustment following stakeholder input. Goals that prevent or inhibit implementation are not desirable, especially in education.

Although, in an effort to distinguish developmental from rational planning, Clark referred to this model as goal-free, this term can be deceptive to school leaders not well versed in this model. Organizations that employ developmental planning have goals; they are just less specific and can be articulated further along in the process as a means of generating greater stakeholder involvement than in those organizations using more rational planning models.

CHOOSING A PLANNING APPROACH

This is an important issue that should be resolved prior to executing the specific plan(s) that will be used. A logical place for resolving this issue is at the readiness phase of the process. Each of the models discussed has strengths and weaknesses that impact the probability for success. The variable at Table 1, Item 16, can guide this effort. A classic example is found in organizations that have undergone repeated and unsuccessful attempts at change, perhaps the typical three or four year reform cycle. This is a very different organization than one that has had successful, little, or no experience of this nature. The planning process in the former is at risk of quiet failure; the latter is a far better bet. In a similar way, as in Table 1, item 11, how able is the planner to free up staff time?

Mackay (2004) proposed a schema in which rational planning models, which includes strategic planning, would be used in predictable environments with stable and clear goals. Another approach, which seeks to identify common ground and avoids areas of potential conflict, would be used in clear, predictable environments with ambiguous or unstable goals. Incremental planning would be the preference for complex, unpredictable environments with stable, agreed-upon goals. Finally, Mackay called for inspirational leadership as the planning approach for complex, unpredictable environments with unstable or conflicting goals.

HISTORY OF STRATEGIC PLANNING

Initially, strategic planning was considered as a rational, very goal-oriented, process that produced plans of a similar nature. Over time this has changed to a more flexible view that seeks greater stakeholder involvement.

It is widely considered to have its roots in the military of Ancient Greece (Bayuk, 2012; Blackerly, 1993; Young, n.d.). Each of the ten Greek tribes annually elected a *strategos* to head its regiment. At the battle of Marathon, in 490 B.C., these *stratego*i served as a council to the ruler (Blackerly, 1993). In 1916, Nelson P. Lewis published his seminal book related to strategic planning, *Planning of the Modern City*. In 1920, the Harvard Business School developed the Harvard Policy Model, forerunner to the Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis model that lays at the heart of many strategic planning models today (Bayuk, 2012). In the 1950s, Igor Ansoff, known as the father of strategic management, developed the Product, Market, Growth Matrix, which employed many of the principles of strategic planning (Bayuk, 2012). In the 1950s and 1960s, the Department of Defense adopted related planning tools, such as the Planning-Programming, Budgeting System (PPBS). Through the 1960s, virtually every Fortune 500 Company, and many smaller companies, adopted strategic planning (Blackerly, 1993). In the 1970s, this expanded to include Management by Objectives (MBO) and Zero-based Budgeting (Young, n.d.). Industry also adopted the strategic planning approach in the 1970s, spurred on by the Boston Consulting group's Product Portfolio Model and Harvard Business School's Michael Porter Five Forces Analysis Model (Bayuk, 2012). In the late 1980s, both the American Association of School Administrators and the American Society for Curriculum and Development promoted strategic planning. In 1996, the Interstate School Leadership Licensure Consortium mandated that school leaders use strategic planning (Council of Chief State School Officers, 1996). In 1999, the National Baldrige Quality Program for Education strongly implied the necessity of strategic planning by its awardees (Young, n.d.).

Definition of Strategic Planning

There is no standard, agreed-upon definition of strategic planning. Drucker (1993) viewed it as a process of entrepreneurial and methodical decision making with the maximum knowledge possible of the future and the assessment of results to targets in a cybernetic feedback process. Young (n.d.) noted that it is a responsive, long-term policy tool based on benchmarks, capabilities, and needs. One simplistic definition is, "Strategy, it turns out, is really about trying to work out a sensible way to get from one stage to the next (Why a strategy?, 2013, p. 3). A more complete definition comes from the Balanced Scorecard Institute (n.d.): strategic planning is an organizational management activity that is used to prioritize, focus energy and resources, strengthen operations, ensure that employees and other stakeholders are working toward common goals, establish agreement around intended outcomes/results, and assess and adjust the organization's direction in response to a changing environment. It is a disciplined effort that produces fundamental decisions and actions that shape and guide what an organization is, who it serves, what it does, and why it does it, with a focus on the future. Effective strategic planning articulates not only where an organization is going and the actions needed to make progress, but also how it will know if it is successful.

Benefits of Strategic Planning

Numerous authors tout the benefits of strategic planning. Zuckerman (2012) noted that with rapidly changing technology, increasing competition, and a shortage of well-prepared professionals, there is a need for strategic planning to provide for contingency planning, for it affords the organization with "a clear self-concept, specific goals, and guidance and consistency in decision making" (p. 2). It helps leaders understand the present and think about the future, recognizing the signals of pending change. It improves vertical and horizontal communication and encourages innovation and change. Fogg (1994) posited that it: secures the future; provides a roadmap, direction, and focus; sets priorities; allocates resources; establishes measures; gathers impact and ideas; generates commitment; and coordinates actions. Axson (2010) added that it increases flexibility, simplifies planning by removing certain options, and retains its relevance in good times and bad. In higher education, Hinton (2012) favored strategic planning as it provides a forum for campus-wide conversations about important decisions.

Templates of Strategic Planning

There seems to be an infinite variety of strategic planning models and templates, many ad hoc with little broad support, but there is considerable overlap among them. Lins (n.d.) specified some of these similarities: appropriate people involved, effective use of time, clear view of intended outcomes, implementation of actions, systematic evaluation of purposes, and regular review and revision of the plan and action steps. Lins went on to identify various specific templates of strategic planning, including Vision-Based, Goal-Based, Issues-Based, Alignment (of Mission with Resources), Scenario Planning, Organic or Self-Organizing, and Real-Time Planning. Other examples can be found in McNamara (nd) who also discusses models such as issues-based strategic planning, organic strategic planning, etc.

One of the most commonly used strategic planning templates in education has been Cook's 1990 model. Cook has used this template to lead strategic planning processes in over 1,200 schools and districts across the U.S., and continues to do so today (Cook, 1995). Countless other schools and districts have followed this template through the use of his books. This template calls for the following steps:

- Determine the organization's fundamental convictions, values, and character – its beliefs.
- Describe the unique purpose for which the organization exists and the specific function it performs - its mission.
- Determine the management pronouncements that establish the parameters within which the organization will accomplish its mission – its strategic policies.
- Determine the characteristics that contribute to the ability of the organization to achieve its mission – its strengths.
- Determine the characteristics that limit the ability of the organization to achieve its mission – its weaknesses.
- Determine the arrangement of authority and responsibilities among people within the organization – its organizational structure.
- Determine what other entities successfully attempt to fill the same need as the planning organization – its competition.
- Examine those forces that an organization has little or no control over.
- Express the desired, measurable end results for the organization – its objectives.
- Determine the broadly stated means of deploying resources to achieve the organization's objectives – its strategies.
- Outline the tasks required to implement that program or strategy, the person responsible for each task, the due date for the completion of each task, and an analysis of the benefits and costs for the specific action plan.

Another popular strategic planning template, particularly in higher education, is Bryson's (1988) process for public and non-profit organizations. This template consists of eight steps quite similar to Cook's:

- Development of an initial agreement concerning the strategic planning effort.
- Identification and clarification of mandates.
- Development and clarification of mission and mandates.
- External environmental assessment.
- Internal environmental assessment.
- Strategic issue identification.
- Strategy development.
- Description of the organization in the future.
- Development of actions and decisions to implement the strategies.
- Evaluation of the results.

The Decline of Strategic Planning in Education

As early as 1991, Kaufman and Herman wrote that strategic planning is in danger of becoming just an educational fad. Mintzberg (1994) wrote a voluminous, well-documented text entitled *The Rise and Fall of Strategic Planning*. Similar questions were raised by Miech (1995).

In part, this decline stems from the lack of quality research that links strategic planning to organizational performance, e.g., student achievement on standardized examinations (Basham & Lunenburg, 1989; Zuckerman, 2012). Also, Green (2012) noted that 60% of organizations do not link strategic planning to budgeting, 75% do not link employee incentives to strategies, 86% of business owners and managers spend less than one hour per month discussing strategy, and 95% of a typical workforce do not understand their organization's strategy. The very term strategy has been so overused and misused that many consider it meaningless (*Why a strategy is not a plan*, 2013). Zuckerman (2012) continued this thought, concluding that strategic planning is not strategic, but rather is ritualistic and reductionist. As Axson (2010) stated, "Today you can define strategy just about any way you like, and that is a large part of the problem" (p. 1).

Why Strategic Planning Does Not Always Lead to the Desired Results

The Natural Resources Management Gateway (n.d.) provides an extensive list as to why strategic plans often fail:

- Failure to understand the customer and why they come to you;
- Not determining whether or not there is a real need for the product or service;
- Inadequate or incorrect marketing research;
- Inability to predict environmental reaction – what will competitors do, will government intervene?
- Over-estimation of resource competence;
- Failure to develop new employee and management skills;
- Failure to coordinate;
- Inadequate reporting and control relationships;
- Organizational structure not flexible enough;
- Failure to obtain senior management commitment;
- Failure to get management involved right from the start;
- Failure to obtain sufficient company resources to accomplish the task;
- Failure to obtain employee commitment – new strategy not well explained to employees, no incentives given to workers to embrace the new strategy;
- Under-estimation of time requirements;
- No critical path analysis done;
- Failure to follow the plan – no follow through after initial planning, no tracking of progress against plan;
- No consequences for above, (p. 2)

Obviously, this list is best suited for competitive business environments, but many of its elements are common reasons why strategic planning in education often does not lead to success. In fact, from a business perspective, the list is about the same as that found in most defined planning processes including those presented in this paper.

Similarly, Zuckerman (2012) posited that strategic planning often fails to involve the appropriate people; is conducted independent of financial planning; suffers from analysis paralysis; fails to address difficult, critical issues; fails to achieve consensus; lacks flexibility; and ignores resistance to change. Mackay (1994) discussed the fact that analysis does not necessarily lead to synthesis.

Beach and Lindahl (2004) raised specific questions of strategic planning's relevance to educational planning:

- Are educational environments truly rational?

- Are schools free to alter their missions fundamentally?
- To what extent can schools adequately define their organization’s values and visions?
- Is strategic planning an efficient model for use in public schools?
- Does the nature of school allow significant resource redirection?
- Is the nature of implementing change in schools compatible with strategic planning?

The authors of this article propose that for strategic planning to be effective in an organization, the following factors, as presented in Table 1, must be present:

Table 1

Common impacting variables found in the planning and change literature

1	Acceptable Staff Skills	15	No Major and Few Physical Constraints
2	Adequate Learning Time	16	Non-Negative Experiences with Change
3	Adequate Plan Flexibility	17	Ongoing Aid, Training, & Staff Development
4	Adequate Preparedness for Change	18	Ongoing Post-change Funding
5	Adequate Resources	19	Openness in Peer Consultation
6	Administrative Support	20	Positive Collegial Relationships
7	An Orderly Organization	21	Positive Communication Capacity
8	Available Resources and Materials	22	Positive Faculty Demographics (age, gender)
9	Clear Goals and Expectations	23	Provision for External Consultants (if needed)
10	Definitions for Proposed Activities	24	Recognized Teacher Competence
11	Extra Faculty Time and Energy	25	Stakeholder Access to Observe Innovations
12	Few Competing Change Programs	26	Supportive Institutional Culture and Climate
13	High Levels of Faculty/Staff Education	27	User Commitment
14	Manageable Size of the Change Effort		

The contextuality of strategic planning was also discussed by McNamara (n.d.), who called for planners to examine the purpose of the planning, their organization’s history with planning, the organizational culture, and the organization’s environment. However, the greatest description of why strategic planning has declined in popularity may be found in the words of former world heavyweight boxing champion, Mike Tyson: “Everyone has a plan until they get punched in the mouth.”

CONCLUSIONS

Strategic planning in education certainly continues to play an important role; however, there is growing recognition among educational leaders that it is not the only approach, nor is it appropriate in all situations. As Beach and Lindahl (2004) concluded, “The coalescence of policy around a single planning form may not be in public education’s best interests” (p. 1). So, educational planners are called upon to be fluent with a variety of planning approaches, to know the strengths and weaknesses of each, and be able to assess their organization’s internal and external contexts to determine which to use for any given time or purpose.

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Note: The references marked with asterisks are the ones the authors consider to be most directly related to the planning literature.