



HOW TO STRATEGICALLY MANAGE CHANGE IN SCHOOLS?

A toolkit for school change agents



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INTRODUCTION

This material is for those who want to lead change or development in their school. This chapter introduces an impact-based strategic approach.

INTRODUCTION



Which approach to use?

When developing a school, it is worth using an **impact-based** strategic approach. This means treating the school as an organization that aims to achieve a specific social impact, for example, providing high-quality education.

Why use this one?

Developing a school in this way will create lasting and effective change that training, or narrow development focuses alone, cannot achieve.

INTRODUCTION



How can we achieve thoughtful systemic change in schools? How can we develop the school as a whole so that it works as it should? In order to answer these questions, we at the DD Foundation developed an approach that we have successfully piloted in the course of our consultancy and strategy work with various schools.

From this perspective, a school is first and foremost an **organisation with a social impact**. This means that when thinking about and developing a school as a whole, its governance systems, practices, culture and fundamental objectives should be considered in the light of the **impact** the school wants to have through its activities. For example, what kind of children and young people will emerge from school and what kind of education we want to give them.

In addition to impact, co-creation is an important aspect of this approach. A school is certainly not the type of organisation where change or development happens from the top down. They must be the result of a joint effort by many actors. Setting a vision and implementing a strategy together brings the school community together and creates a more cohesive school culture. To support this, we have built the strategy approach around the **principles of co-creation**.

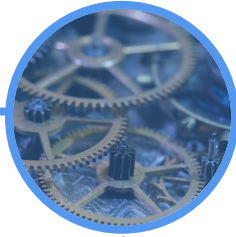
This approach does not contradict other approaches - e.g. the school as a place to share knowledge, socialise or work - but rather embraces them. The guide consists of two main parts. The first part provides an overview of the most important principles of the strategic approach, while the second part describes the planning and implementation of the strategic process in the school context.



FUNDAMENTALS OF STRATEGY

This chapter gives an overview of the most important principles of the strategic approach.

VISION



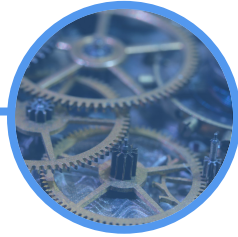
Vision of the learner

What kind of young person do you want to shape?

Vision of the school

What kind of school best supports this goal?

VISION

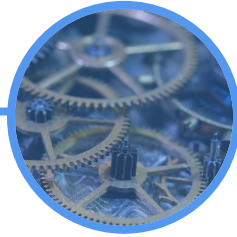


The strategic vision starts with the question "What **impact** do we want our teaching to have on young people?". Answers to this question can be found in national strategy documents and curricula. At the same time, there is a risk of copying key education policy documents and guidelines without sufficient reflection on how they really fit into the context of a particular school. In this way, a school may find itself in a situation where it has an ambitious but vague vision, with the result that its focus and impact on key objectives begins to fade and its motivation to implement change diminishes.

To avoid this problem, a school could self-reflect on its vision. This does not mean ignoring the big goals and trends in education, but placing them in the context of the school and the local area. A shared vision provides the necessary motivation and direction for the school community to make significant changes alongside day-to-day activities and demands.

Creating a vision is facilitated by dividing it into two parts: a learner vision and a school vision. The first part describes the impact we want to have through our actions, while the second part shows what our school needs to be like in order to achieve the desired impact. These pieces will be the starting point for all important changes and decisions.

ORGANIZATIONAL PERSPECTIVE



School as an organisation

A well-functioning school is built on carefully structured management systems.

A well-managed school has

- Clearly defined management structures at every level.
- A transparent and inclusive decision-making process.
- Clear roles and responsibilities, with supporting competences and ways of developing them.
- A supportive and motivating school culture, with defined governance structures at all levels.

ORGANIZATIONAL PERSPECTIVE



From the perspective of school development, it is important to look at the **capacity** of the school as an organisation to implement change and to manage day-to-day activities in a purposeful way, against the background of issues related to learning. This depends to a large extent on the school's governance structures and decision-making processes. These are not limited to the actions of the head teacher, but extend to all levels, from the strategic decisions of the management to the day-to-day organisation of teachers' work.

Whereas in the past, decisions were often taken and implemented through a hierarchical 'chain of command', today, management functions in schools are increasingly distributed and organised in a **collaborative** way. Leadership is not the responsibility of one person or a small group. Different roles in the organisation carry out leadership functions according to agreements and needs. Teachers today also increasingly find themselves in a leadership or mentoring role.

For example, a team leader in a bully-free school may at the same time be part of a team in a mobilising school, and vice versa. Similarly, a school leader may be involved in certain projects as part of a team, with a teacher or an interest leader, for example. Teacher collaboration can be organised, for example, in teams based on subject or pupil age groups, led by senior teachers or enthusiastic leaders. Experienced teachers can act as mentors for their new colleagues. It is all part of the school management system.

A flexible and collaborative management system helps to adapt to change, spreads the management burden and supports the professional development of staff.

CO-CREATION



Why co-creation?

The whole school community can contribute to the development of the school in one way or another. The broader the range of contributors and contributors, the better and more widely adopted the solutions typically are.

Co-creation principles

- The different actors actively contribute to the development of the school.
- Solutions are created and implemented to meet people's needs.
- The process is transparent, rules and agreements are established jointly.
- The space is equally conducive to different perspectives and solutions.

CO-CREATION



Successful implementation of the strategy requires that the school community is ready to contribute to its development, or at least to change with it. Therefore, the strategy should be adopted in a way that encourages open thinking, commitment and collaboration.

Applying the principles of co-creation will help to achieve this. It encourages a wide range of people to work together from the outset and to contribute actively to solutions. It also strengthens team spirit, brings people together and creates a more cohesive school culture.

Teachers, pupils, parents, school management and, where possible, local education leaders could all contribute to the school's development. In this way, well thought-out solutions can be found that genuinely respond to the interests and needs of the parties involved.

Co-creation can be successful if the right conditions are in place. It needs an open and safe environment for discussion, where it is comfortable to share knowledge, experience and ideas. In addition, it is important to establish agreements on how communication, accountability, decision-making and implementation of results are organised.

It is important to distinguish between co-creation and involvement. Involvement takes place at different stages of the process to gather input and feedback. Co-creation, on the other hand, means **participation in the process as a whole**, in a way that has a direct impact on the outcome. When designing a strategy, it is worth thinking about who is involved in the process in a co-creative way, and who it is important to involve at a particular stage. Suggestions on how to co-create a strategy are included in the various chapters. For practical tools for co-creating, we also recommend exploring the SiLab co-creating toolbox.



STRATEGY PROCESS

This chapter describes how to do the strategy process in school.

PROCESS DESIGN



Steps

Choosing a process leader and building a team

Mapping the current situation

Setting the vision

Setting development directions and objectives

Drawing up a plan

Implementing the plan, testing, collecting feedback

PROCESS DESIGN



Systemic change does not happen overnight. Creating and implementing a strategy is a lengthy process for which it is important to plan time and energy in advance. When planning the process, it is worth bearing in mind that the more people are involved, the greater the time commitment. For example, with a smaller team and fewer engagement activities, it can take three months from the start of the process to testing and implementing changes. For a larger team, the timeframe might be six months. Two timelines are shown below as examples: one for a shorter process and one for a longer process.

In order to ensure good use of time and a successful process, it is recommended to think through the process plan step by step in advance and to time the most important activities. From here on, the whole material is divided into sub-chapters based on the steps of the strategy process. Each sub-chapter contains guidance, helpful examples and guiding questions to help plan and carry out the process.



Getting started:
planning the process,
forming a team



Workshop I:
agreements, state of
play and conclusions



Workshop III: Setting
trends and objectives



Implementation:
testing, collecting
feedback

OCTOBER

NOVEMBER

JANUARY

OCTOBER

NOVEMBER

DECEMBER

JANUARY

FEBRUARY

MARCH



Mapping the
current
situation



Workshop II:
Setting a vision



Preparation and
presentation of the
development plan

TEAM BUILDING



Process management

The strategy process needs strong leadership to be consistent and effective.

Motivated participants

The working group should be made up of people who genuinely want to be involved in the process and actively contribute to the development of the school.

TEAM BUILDING



Good leadership is needed to drive the strategy process. It should be led by someone (a steering group if necessary) who can provide consistent direction and manage their own and other participants' time. He or she should have a good overview of the school's resources and funding opportunities (e.g. school budget, local authority grants, project funding). It is also important that he/she can see the big picture and is open to different perspectives.

The working group (co-creation team) is made up of members of the school community: teachers, pupils, parents, representatives of the management and school partners, including representatives of the local authority. The team is made up only of stakeholders who wish to contribute actively and constructively to the development of the school.

- A larger working group (more than 10 participants) brings different perspectives to the table, facilitates the generation of ideas and allows for smaller groups focusing on different development issues.
- A smaller working group (up to 10 participants) is more flexible and efficient, allowing faster decision-making and implementation of solutions.

The success of broader engagement depends on its targeting and timing.

- At the beginning of the process, the needs and expectations of the school community could be mapped through open discussions and questionnaires. This will give the whole school community the opportunity to have their say.
- Pilots and experiments will allow the strategy to be put into practice and feedback to be gathered before widespread implementation. At this stage, input could be gathered in particular from those who are involved in implementing the changes and who will be directly affected by them.

MAPPING THE SITUATION



Informed choices

Planning school developments requires a good overview of the current situation. By combining different approaches, a comprehensive overview of the situation can be obtained.

An opportunity to have your say

Mapping out the different stakeholders and perspectives gives the whole school community the opportunity to have a say in the school's development.

MAPPING THE SITUATION



Making informed choices requires a good **overview of the current situation**. This is necessary in order to understand the school's strengths, challenges and needs and to create a realistic and focused action plan. There are different ways of collecting data.

- Review existing school and sector development plans, curricula, internal evaluation reports and other strategic documents.
- Collect information on student academic performance, attendance, graduation rates, satisfaction and other indicators.
- Talk to teachers, students, parents and school management to gather input on their interests, needs and concerns. Conduct surveys to get a broad picture of the situation.

Tables, documents, notepaper, etc. can be used to collect data. However, in order to draw useful conclusions, they should first be **analysed**, for example by grouping the information into clear categories.

- Strengths (what is already working well?)
- Problems (where are the bottlenecks and obstacles?)
- Opportunities (what resources and opportunities can be exploited?)
- Threats (what could hinder progress?)

Useful conclusions can be drawn from the data to inform choices in the strategy process.

- How does this concrete situation relate to our vision?
- Why is something a problem (or a strength)? Why does the problem exist?
- What factors are beyond the school's control (e.g. funding constraints)?
- What changes can the school make within its capacity?

Conclusions could be formulated clearly. Rather than "Students are not motivated enough." it could be a description of the wider situation and the reasons. "Pupils feel they have little choice in their learning process, which reduces their interest and engagement."

VISION OF THE LEARNER



Impact-based

A school is an organisation with a social impact. Unlike a business, whose main purpose is to make a profit, a school contributes to society through its impact on the learner.

People-centred

That is why it is important to ask what kind of young people our schools could be shaping. So we focus on what matters most – our learners.

VISION OF THE LEARNER



"At PERG, everyone learns how to tackle challenges with a high societal impact" - from the Pelgulinna State Gymnasium website.

The question "What impact do we want our teaching to have on young people?". or, in other words, "What kind of young person do we want to shape?", is the starting point for school development and strategic thinking, as it helps to identify the key qualities we want to develop in our learners as a matter of priority. The more precisely these qualities are identified, the easier it will be to plan the school's development.

What to think about when creating a vision?

- What skills and knowledge do we want our graduates to have?
- What habits and attitudes will help them to succeed in the future?
- What role will he or she play in his or her community, in society and in the world?
- What kind of young person will our school and the opportunities and specificities of our local area help to shape if we make the most of them?

A good example can be found on the [Lake Washington School District website](#).

With a vision, it is easier to envision and agree on the kind of school you want to develop because the foundation on which to build the development plans is already in place.

VISION OF THE SCHOOL



What it looks like...

A good starting point for creating a vision for the school is to imagine a day in our school in five to ten years' time. What will a school day look like when the impacts described in the previous section have become a normal part of everyday life?

Common picture

Reflecting on the vision will help all parties - teachers, students, parents and partners - to understand the values and principles on which the school is based.

VISION OF THE SCHOOL



The second half of the vision is a description of our school as one where the positive impact of the school corresponds to the learner's vision described in the previous section. It helps all parties - teachers, students, parents and partners - to understand the values and principles on which the school is based. It gives a clear direction to the school's development and motivates it to contribute.

Imagine your school in 5-10 years' time. Graduates of the school will come to life exactly as you described them in the previous step. What would a day in that school look like?

- What are the daily activities, interactions and traditions? What does the school and the environment in which these activities take place look like?
- How do people feel? What excites them and makes them curious?
- How do people behave and interact? What choices can they make about how to get involved in school life?
- How do the learner characteristics described in the vision translate into these issues?

The next step could be to think about how the **organisational machinery** works in the context of such a school day. What approaches, structures and practices enable and reproduce the day-to-day running of the school?

- What are the governance structures of the school? On what are decisions made and how? How is decision-making organised at different levels? Who is involved in these decisions and in what way?
- What are the main pedagogical approaches? How is cooperation organised for their implementation and development?
- What roles and competences enable such a school day (e.g. is the class teacher an information relay or a mentor?); How are these competences developed on an ongoing basis?

Make it inspiring and guiding - the vision should not be too general or just a wish list, but a holistic, clear and motivating goal.

SETTING DEVELOPMENT FOCUSES



A bridge between vision and practice

Well-articulated development paths will help the school to move towards its vision by linking it to practical actions.

Measurable result

Each development path is accompanied by clear and measurable objectives to help deliver the desired changes.

SETTING DEVELOPMENT FOCUSES



Decisions should then be taken on how to bring the school closer to the vision, step by step. To do this, it is important to set **clear development paths**. Well-articulated development paths create a bridge between vision and practice. Each development path is accompanied by objectives that describe, in a measurable and actionable way, how the development path will be implemented. For example:

- Development Goal - "Increasing student autonomy - more choice both in the content of learning and in the development of the school".
- Goal - "Twice a year, the school community will hold joint discussions on school development, and the best proposals will be tested in the school over the following six months."

Open-ended questions will help to set development orientations and objectives.

- What conditions and preconditions are needed for the school to have the desired impact?
- What aspects of our school need to change? How can these changes be implemented?
- What strengths and opportunities can we make better use of in the school and the region? How?
- What problems and bottlenecks need to be addressed?

In implementing the strategy, you can focus on one development at a time or work on several in parallel. In either case, it is important to ensure that the delivery of change is managed, consistent and collaborative.

DRAWING UP A PLAN



Plan or development programme

The strategy is usually implemented on the basis of a plan or development programme.

User-friendly

A simple plan can be sketched out on a notepad, but for a more comprehensive action plan it is worth creating a well-structured document. It should be as thin as possible to avoid getting stuck in a drawer.

DRAWING UP A PLAN



Once the mapping of the current situation is done, the vision is set and the development paths are defined, the implementation of the strategy starts. This is usually based on a plan or **development plan**. A simple plan can be sketched out on a diary sheet. For a more comprehensive action or development plan, it is worth choosing a solution that gives the plan a clear and coherent structure and is easy to use. A good plan will include an overview of development directions, objectives, timeframes, implementers and metrics. Below is an example of a simple action plan.

Development Focus	Goal	Responsible parties and participants	Timeframe	Measures of success
Development focus 1: Increasing student autonomy - more choice both in the content of learning and in school development	Goal 1: Twice a year, the school community holds joint discussions on school development, with the best proposals being tested in the school over the following four months.	Responsible: head of school, head of recreation, student body president. Participants: ten participants from each interest group: teachers, students, parents	1st meeting: autumn 2025 (+4 months for testing) 2nd meeting: spring 2026 (+4 months for testing)	Process: 2 meetings. Outcome: 2 sessions. Two rounds of testing. Impact: At the end of the year, the impact on the perceived autonomy of the students will be evaluated (interviews with participants).
	Goal 2			
Development focus 2	Goal 1			

IMPLEMENTING THE STRATEGY



To action!

Delivering on the strategy means turning good ideas into action.
Success = small steps + incremental experimentation + continuous feedback.

Ready?

A good strategy is never finished - it evolves with the school.

IMPLEMENTING THE STRATEGY



In the implementation phase of the strategy, good ideas turn into **action**. It is important to keep the focus on what exactly you want to change and why. No plan works exactly as it was conceived at the outset. Fortunately, there are different ways to successfully implement change nonetheless.

It's worth starting small and **experimenting**. This is a good way to test changes - for example, trying out a new curriculum in one class before implementing it school-wide. Trials provide an opportunity to see what works and what needs to be adjusted before wider implementation.

Constant **feedback** will help to understand whether things are moving at the right pace and whether everyone involved can cope with the changes. Regular discussion with teachers and students will help to stay on track and make adjustments where necessary.

Changes work better when everyone feels part of the process. Teachers, students and parents should have a say and be able to offer their ideas. When people understand why something is being done and can have a say in the process, their motivation increases and reluctance decreases.

Once something has been successfully implemented, it should be **kept and nurtured**. Change is not a one-off project, but part of the school culture. They need care and attention in the future.

The same is true for school thinking and development as a whole. A good strategy is never finished - it evolves with the school.

ABOUT US



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Petrik Saks is a consultant at DD StratLab, where he has assisted organisations in education, youth and civil society on strategy and governance issues, including the AHHA Research Centre, Vastseliina Gymnasium, the Estonian Association of Police Helpers, Elektriteatri and the Ministry of Education and Research.



Christo Alliksoo works as a consultant at DD StratLab. His work involves designing and implementing strategy processes in a variety of organisations with societal impact, including educational institutions, local governments and NGOs. Christo studied psychology and change management in society at the University of Tartu. In addition, he has completed the Youth School programme, where he worked as a teacher for two years.



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