

HOW TO CREATE A VISION AND STRATEGY

Clarity of vision is the first of the three core functions for every governing board. It's up to the governors and trustees to ensure that the vision, ethos and strategic direction of the school are clearly defined.

But a number of barriers prevent governing boards from creating a clear and effective vision.

1

UNDERSTANDING THE WORD 'VISION'

The first is that there can be confusion about what the word 'vision' means. Typically, the answer to a question about vision will yield an answer that either articulates the values of the school or trust, or references the senior executive leader's vision. Our view is that the school's vision should state explicitly what the school or trust will look like in three to five years' time, including a concise expression of what the pupils will have left school having learned.

2

WHOSE VISION IS IT?

The second barrier is a misunderstanding about who owns the vision. The initial visioning work should be carried out by the governors or trustees in partnership with senior leaders.

3

CARRY OUT A SWOT ANALYSIS?

To get to where you want to be, you've got to know where you are now. A good starting point is a strengths, weaknesses, opportunities and threats (SWOT) analysis to ascertain how well the school or trust is doing in the light of both internal performance and external pressures.

4

LISTEN TO YOUR LEADERS

It's also important to listen to senior leaders, so they should be given a chance to express their views about the current landscape and possible direction of travel. Not only are they experts who know the likely pitfalls, they are also going to be tasked with achieving the vision – and it must be achievable.

5

AIM TO IMPROVE

In projecting forward a few years, we should be aiming to do things better, to continuously improve, to make the experience of school the very best it can be for children and young people.

6

LISTEN TO YOUR STAKEHOLDERS

From this work, the governing board should have some key messages that will form the basis of a draft vision, which can then be shared with key stakeholders, such as staff, parents and the children. Involving the school community in the vision through consulting, and maybe altering and tweaking it at this drafting stage, is invaluable in demonstrating that there is genuine ambition for the school or trust and that the contribution of all stakeholders is recognised.

7

AND FINALLY

Finally, the vision and strategy should be approved by the governing board and handed over to the leadership team for work to begin on planning how to implement it.

TIP: Combine this resource with 'Being strategic: a guide for governing boards'

BEING STRATEGIC

CREATING A VISION MISSION – VALUES – VISION

Our school's mission

--

TIP: Say it in a sentence. Could be a strapline!

Our values

Value 1

Value 2

Value 3

Value 4

Value 5

Vision

Aim 1

Aim 2

Aim 3

Aim 4

Aim 5

TIP: Write a brief intro, then five key sentences describing what the school will look like in three to five years. Include what the children will have left having learned.



CONSIDER

- How the pupils will be prepared for the next stage of their education.
- What the pupils will have left the school or trust having learned, in terms of both attainment and progress.
- What other opportunities the pupils will have experienced.
- How your vision will be achieved, with reference to the quality of teaching at the school or trust, support for staff, any buildings or infrastructure improvements required, relationships with the community, working collaboratively with others and the ethos in which it will be implemented.
- Beware of confusing vision with values or ethos, they aren't the same.

ACHIEVING OUR VISION

Now that you have a vision, think about how you will know that your vision has been achieved: the 'outcome indicators'.

Make sure you know what the risks and barriers are that may get in the way of you achieving your vision. What does the school or trust need to prioritise in order to overcome these risks and barriers?

This is where you turn your vision into a strategy.

Vision breakdown	How will we know our vision has been achieved – the outcome indicators?	What are the risks and barriers that may stop us achieving our vision?	What does the school or trust need to do to overcome the risks and barriers and achieve its vision?

TURNING VISION INTO STRATEGY



DETERMINE THE STRATEGY

- Identify a key priority for achieving each aspect of the vision.
- Don't be afraid to identify big ideas, such as joint working opportunities.
- Each key priority must be measurable; in other words, expected impact should be defined at the outset.
- Each priority must be supported by the appropriate budget and staffing structure.
- Key priorities should be broken down into annual, and then termly, measures.
- Try not to have more than six key priorities.
- Don't forget that the strategy should be approved by the governing board, but then handed over to the school or trust, in order for them to develop their operational (school development) plans.

TIP: How each key priority will be achieved is not for the strategy document.

Instead, these priorities will form the basis of the School Development Plan (SDP). Think of the SDP as the action plan for your priorities. The senior executive leader will report progress in achieving the priorities termly.

Key priorities

Priority 1

Priority 2

Priority 3

Priority 4

Priority 5

Priority 6

TIP: Start with six and make them SMART (specific, measurable, achievable, realistic and time-bound)

BEING STRATEGIC

Now you have a vision and a strategic plan. The next step is monitoring the strategy.

Senior leaders should produce a termly report on how the strategy is working. This should be the main focus of the termly meeting, and should include updates on progress being made towards achieving each key priority. Those governing can then question the senior leader on any aspect of the strategy that they wish.



TO CONSIDER

Consider how the governing board will expect progress to be evidenced. Here are some examples:

- Progress in raising attainment will require data on pupil standards.
- Progress in improving the quality of teaching will require data on pupil progress
- Progress on behaviour for learning will require data on attendance and exclusions, and information from surveys and focus groups.
- Progress on staff morale will require data on staff absence and survey information.
- Progress on engagement with parents will require data on complaints and survey information.
- Remember, not all improvement priorities are quantitative and some of the most important outcomes will not lend themselves to simple quantitative measurement.

**Will the school's judgements need to be externally validated? Your call.
But have a position!**

This governing board will also need to check that the budget is on track and continues to support the key priorities.

You might decide that you require less information if a priority is on target. If it isn't, you might want to ask for more information.

TIP: Governors' visits should align to key priorities.

So if a key priority is to improve attainment and maths is a specific focus, a governor or trustee could be aligned to the head of maths in order to understand how the school or trust ensures improved attainment in maths.

EVALUATION

Key priorities	
Targets/key performance indicators	Are they being met? If not, is this for good reason or are excuses being made?
Unpredictable external factors	Has something unforeseen changed the landscape in which the school is working?
Long-term sustainable improvement	Is this still the focus or are you constantly firefighting?
Courageous conversations	Are these happening? Are relationships productive?
Adjusting	A strategy is not a plan, but is an approach and, as such, must be adaptable to changing events.
Review	At the end of the three-to-five year period, plan enough time for a regular review of the vision of the trust or school.