



# Strategy and Strategic Leadership in Education: A Scoping Review

Marisa Carvalho<sup>1\*</sup>, Ilídia Cabral<sup>1</sup>, José Lopes Verdasca<sup>2</sup> and José Matias Alves<sup>1</sup>

<sup>1</sup>Universidade Católica Portuguesa, Research Centre for Human Development, Porto, Portugal, <sup>2</sup>Universidade de Évora, Évora, Portugal

## Introduction

Strategy and strategic leadership are critical issues for school leaders (Davies and Davies, 2006; Davies and Davies, 2010; Eacott, 2010a; Eacott, 2011). However, strategy as a field of research has largely been overlooked in educational leadership literature (Davies and Davies, 2006; Eacott, 2008a; Eacott, 2008b; Davies and Davies, 2010; Eacott, 2011). Most of the theoretical and empirical work on strategy and strategic leadership over the past decades has been related to non-educational settings, and scholarship devoted to these issues in education is still very limited (Cheng, 2010; Eacott, 2011; Chan, 2018).

The concept of strategy appeared in educational management literature in the 1980s; however, little research was produced until the 1990s (cf. Eacott, 2008b). Specific educational reforms led to large amounts of international literature mostly devoted to strategic planning (Eacott, 2008a; Eacott, 2008b; Eacott, 2011). For a long period, the concept of strategy was incomplete and confusing. The word “strategy” was often used to characterize different kinds of actions, namely, to weight management activities, to describe a high range of leadership activities, to define planning, or to report to individual actions within an organization (Eacott, 2008a). Strategy and strategic planning became synonymous (Eacott, 2008b). However, strategy and planning are different concepts, with the strategy being more than the pursuit of a plan (Davies, 2003, Davies, 2006; Eacott, 2008a; Eacott, 2008b; Quong and Walker, 2010). Both phases of plans’ design and plans’ implementation are related, and the quality of this second phase highly depends on planning’ quality (Davies, 2006; Davies, 2007; Eacott, 2008a; Eacott, 2008b; Eacott, 2011; Meyers and VanGronigen, 2019). Planning and acting are related and must emerge from the strategy. As stated by Bell (2004).

Planning based on a coherent strategy demands that the aims of the school are challenged, that both present and future environmental influences inform the development of the strategy, that there should be a clear and well-articulated vision of what the school should be like in the future and that planning should be long-term and holistic (p. 453).

Therefore, it is necessary to adopt a comprehensive and holistic framework of strategy, considering it as a way of intentionally thinking and acting by giving sense to a specific school vision or mission (Davies, 2003, 2006; Eacott, 2008a; Eacott, 2008b; Quong and Walker, 2010).

The works of Davies and colleagues (Davies, 2003; Davies, 2004; Davies and Davies, 2004; Davies and Davies, 2006; Davies and Davies, 2010) and Eacott (2008a, 2008b), Eacott (2010a, 2011) were essential and contributed to a shift in the rationale regarding strategy by highlighting a more integrative and alternate view. Davies and colleagues (Davies, 2003; Davies, 2004; Davies and Davies, 2004; Davies and Davies, 2006; Davies and Davies, 2010) developed a comprehensive framework for *strategically focused schools*, comprising strategic processes, approaches, and leadership. In this model, the strategy is conceptualized as a framework for present and future actions, sustained by strategic thinking about medium to long term goals, and aligned to school vision or direction.

Strategic leadership assumes necessarily a relevant role in strategically focused schools. Eacott (2006) defines strategic leadership as “leadership strategies and behaviors relating to the initiation, development, implementation, monitoring, and evaluation of strategic actions within an educational institution, taking into consideration the unique context (past, present, and future) and availability of resources, physical, financial and human” (p. 1). Thereby, key elements of strategic leadership can be identified as one that: 1) acts in a proactive way to contextual changes; 2) leads school analysis and response to changing environment; 3) leads planning and action for school effectiveness and improvement in face of contextual challenges and; 4) leads monitoring and evaluation processes to inform decision making strategically (Cheng, 2010). This brings to the arena a complex and dynamic view of strategic leadership as it is a complex social activity that considers important historical, economic, technological, cultural, social, and political influences and challenges (Eacott, 2011).

Along with these authors, this paper advocates a more comprehensive and contextualized view of strategy and strategic leadership, where strategy is the core element of any leadership action in schools (Davies and Davies, 2010; Eacott, 2011). Here, strategic leadership is not seen as a new theory, but an element of all educational leadership and management theories (Davies and Davies, 2010). Even so, these concepts can inform and be informed by diverse leadership theories, a strategy-specific framework is needed in the educational field.

Considering all the above, strategy can be identified as a topic that is being researched in education, in the recent decades. Nonetheless, there is still scarce educational literature about this issue (Davies and Davies, 2006; Davies and Davies, 2010; Cheng, 2010; Eacott, 2011; Chan, 2018). After 10 years of Eacott's analysis of literature on strategy in education, it seems that this educational construct is being overlooked as there is still no consensual definition of strategy, different studies are supported in diverse conceptual frameworks and empirical studies about this topic are scarce (Cheng, 2010; Eacott, 2011; Chan, 2018). Moreover, despite the interest of a multidisciplinary vision of strategy and strategic leadership, we agree with Eacott (2008b) about the need for a meaningful definition of strategy and strategic leadership in education, as it is a field with its specifications. Hence, research is needed for a clear definition of strategy, an integrated and complete framework for strategic action, a better identification of multiple dimensions of strategy and a comprehensive model of strategic leadership that has strategic thinking and action as core elements for schools improvement (e.g., Eacott, 2010a; Hopkins et al., 2014; Reynolds et al., 2014; Harris et al., 2015; Bellei et al., 2016). This paper aims to contribute to the field offering a scoping review on strategy and strategic leadership in the educational field.

A clear idea of what strategy and strategic leadership mean and what theory or theories support it are of great importance for research and practice. This scoping review is an attempt to contribute to a strategy-specific theory by continuing to focus on ways to appropriately develop specific theories about strategy and strategic leadership in the educational field, particularly focusing on school contexts.

## **Methods**

This study is a scoping review of the literature related to strategy and strategic leadership, which aims to map its specific aspects as considered in educational literature. Scoping reviews are used to present a broad overview of the evidence about a topic, irrespective of study quality, and are useful when examining emergent areas, to clarify key concepts or to identify gaps in research (e.g., Arksey and O'Malley, 2005; Peters et al., 2015; Tricco et al., 2016). Since in the current study we wanted to explore and categorize, but not evaluate, information available concerning specific aspects of strategy in educational literature, we recognize that scoping review methodology serves well this purpose.

In this study, Arksey and O'Malley (2005) five-stage framework for scoping reviews, complemented by the guidelines of other authors (Levac et al., 2010; Colquhoun et al., 2014; Peters et al., 2015; Khalil et al., 2016), was employed. The five stages of Arksey and O'Malley's framework are 1) identifying the initial research questions, 2) identifying relevant

studies, 3) study selection, 4) charting the data, and 5) collating, summarizing and reporting the results. In the sections below, the process of this scoping review is presented.

### **Identifying the Initial Research Questions**

The focus of this review was to explore key aspects of strategy and strategic leadership in educational literature. The primary question that guided this research was: *What is known about strategy and strategic leadership in schools?* This question was subdivided into the following questions: *How should strategy and strategic leadership in schools be defined? What are the main characteristics of strategic leadership in schools? What key variables are related to strategy and strategic leadership in schools?*

(...)