

Features of Strategic Planning in the Framework of Educational Organization Development

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Abstract—Today, the issues of strategic management of the development of an educational organization are becoming top priorities. The successful functioning of a modern educational organization in the long term determines the need to determine its strategic potential, the extent and directions of its use, and the ability to adapt to changing environmental conditions. The relevance of the study is due to the fact that for educational organizations that satisfies not only the educational needs of society, but also strives for the sustainability of a competitive position in the market of educational services. The system of higher education is a prerequisite for the development of the state, ensuring positive changes in human capital. The purpose of the study was to reflect the detail of the system of criteria for analyzing the strategy within the framework of the stakeholder model. In the end, the above strategies show how intangible assets (human, informational and organizational capital) of a university contribute to creating value not only for owners (founders), but also for society as a whole and consumers of educational services in particular.

Keywords—strategic planning; educational institutions; higher education system; stakeholder models; development

I. INTRODUCTION

Over the past decades, a number of approaches to the issue of strategic planning of the development of an educational organization have been formed. Regardless of the methodological models for solving this problem, the general concept of strategic planning is based on the analysis of the educational organization and the external environment within which the organization operates. On the basis of this analysis, certain formalism is created of an ideal representation of the future of the organization, methods and methods for achieving a given future, tools and mechanisms for its achievement. For an educational institution, the practical step-by-step methodology proposed by A. Zhemchugov and M. K. Zhemchugov is quite applicable, which allows to develop the strategy tree of the organization, its organizational structure, to coordinate the goals of the enterprise and its managers and ordinary members. The list of methods of strategic planning used in practice by

educational organizations is quite wide and varied. Here, first of all, it is possible to mention the model of stakeholders, PEST-analysis, near-environment analysis, analysis of the internal environment, weaknesses analysis, SWOT analysis, development of a portfolio of strategies, approaches based on a balanced scorecard, project ranking, development of road maps, planning projects.

II. OBJECTIVES AND METHODS

Despite the urgency, the introduction of strategic management at the level of an educational institution is hampered due to the insufficient development of its theoretical and methodological foundations, in particular, the structure and logic of strategic planning. The study uses such general scientific research methods as analysis and synthesis, methods of comparison, analytical, logical-verbal modeling [1] [3].

Choosing and developing a strategy involves determining development priorities, existing alternatives and choosing the one that maximally and for a long period of time will increase the efficiency of the educational institution, its main activities, principles of interaction with the society in which it is located, cooperation with other subjects of education, and also willingness to respond to new social circumstances.

III. RESULTS AND DISCUSSION

Currently, one of the most popular and applied models of strategic planning for the development of an educational organization is the stakeholder model [6] [7] based on the development of criteria for analyzing the strategy [6] within the target groups of the educational organization (“Table I”). This model involves the establishment of a specific composition of the target groups of the educational organization: applicants, students, graduates, employees, employers, investors, supervisory bodies, the founder, etc. For each target group, a scoring assessment of the criteria for its needs is carried out, followed by summing up the scores for each group and obtaining a total score, which determines the consideration of the requirements of interested parties [6].

Methodologically, this approach is quite versatile, simple and intuitive, but the more precisely we want to get a solution, the more precisely we need to decompose each

target group according to criteria parameters, and this can increase the complexity of this approach by several times.

TABLE I. CRITERIA FOR ANALYZING THE STRATEGY IN THE FRAMEWORK OF THE INTERESTED PARTIES MODEL

Interested party	<i>Incoming</i>	Information on the official website of the educational organization Taking into account the situation on the labor market in the future 4-5 years	Criterion
	<i>Trainees</i>	Regular update Service orientation	
	<i>Employees</i>	Consistency Comprehensibility Relevance Ability to influence decision making Involvement Presence of indicators Project availability Personalized responsibility	
	<i>Graduates</i>	Accounting for the labor market situation Problem justification Alumni interests	
	<i>Business</i>	Availability of strategic analysis and planning tools Efficiency mark Understanding of sources of financing Addressing the needs of the business	

PEST-analysis [6] involves the analysis of external factors (legislative, social, political, economic, environmental, etc.) of the distant environment. This analysis represents a matrix approach that does not contain measurements or involves measurements to determine significant and non-significant factors [6].

This analysis involves determining the likelihood of the influence of an external factor, the severity of the consequences and the calculation of the total, as their works for each factor. This analysis requires specification definitions for final numerical values in order of importance (for example, values from -6 to +6 appear to be insignificant and can be neglected). It should be noted that the PEST-analysis does not allow us to speak about the assessment of external factors of the inner circle of an educational organization — first of all, consumers of educational services, competing institutions, employers.

A. Analysis of the Environment

The study of external factors as a near environment is often based on the “Five Forces of Porter” model [3]. This approach involves determining the list of stakeholders that

have a direct impact (impact) on the educational organization. It is necessary to take into account the nature of the influence of the above listed stakeholders of the external environment. For example, consumers of educational services directly influence the strategy of an educational organization, while competing institutions indirectly. Despite of the fact that all of these objects are in the external environment, customers directly influence the strategy of the university, and suppliers and competitors indirectly. Such a scheme rather accurately allows us to illustrate the IDEF0 model, in particular, the stakeholder model proposed in [4] (“Fig. 1”). In this model:

- Direct influence is a controlling influence (state) and exit (business, society);
- Indirect impact: these are resources (employees) and input (applicants).

At the same time in “Fig. 2”, the right-upper part of the block characterizes the direct influence on the activities of the educational organization, and the left-lower part — an indirect influence. This approach was obtained in [3] “the rule of the northeast”.

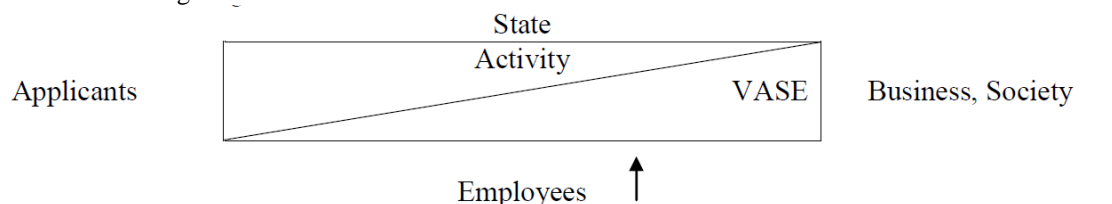


Fig. 1. Model of external factors IDEF0.

Returning directly to the Porter Five Forces model, it should be noted that in this classic campaign, certain gauges are not assumed, which does not allow quantifying external factors and revealing their absolute/ relative significance.

Therefore, it is quite natural to assume the development of this model from the point of view of its filling with various quantitative expert assessments or its modification

within the framework of measuring tables of competitiveness [6].

For the analysis of the internal environment of the educational organization, the so-called Porter's added value chain, which was first proposed in [3] [7], is widely used. Each type of activity (educational, scientific, etc.) involves a separate analysis, since for each of these types there is its own chain of added value.

In the classical approach, Porter's added value chain identifies two types of activity: the main and the supporting. The main activity is admission to study, direct contact work with the teacher, practice, final certification, graduation. The supporting activities include personnel management, finance, infrastructure, information support.

An approach based on Porter's value chain is quite convenient for assessing the strengths and weaknesses of the organization's internal environment. In this case, it is necessary to define the elements of the added value chain, assess their degree of importance for consumers on a certain numerical scale "0-1" (for example, the function of contact work with the teacher may be of greater importance than admission to training), assessments on a numerical scale "-10 +10" degree of compliance with expectations. The latter assessment is carried out taking into account these parameters of the competing organization and if the

organization performs a certain function better, then the numerical value of the degree of compliance is established with a "-" sign. The determination of the final indicator is determined by multiplying the degree of significance by the degree of compliance. All values obtained with a "+" sign characterize the strengths of the internal environment of the organization, with a "-" sign are weak.

B. Analysis of Weaknesses

Further detailed study of the weaknesses may well be based on an analysis of the causal relationships carried out with the help of tools of the logical-structural approach [2]. In this case, it seems effective to build maps of cause-and-effect relationships that show the generation of consequences by specific causes. The arrows on such maps are directed from causes to effects [6] ("Fig. 2"). Such maps are built primarily to determine the initial causes and the subsequent development of corrective and preventive measures.

The availability of complete information on external and internal factors determining the development strategy of an educational organization allows you to switch to SWOT analysis [2], which allows you to perform the ranking and structuring of these factors ("Fig. 3").

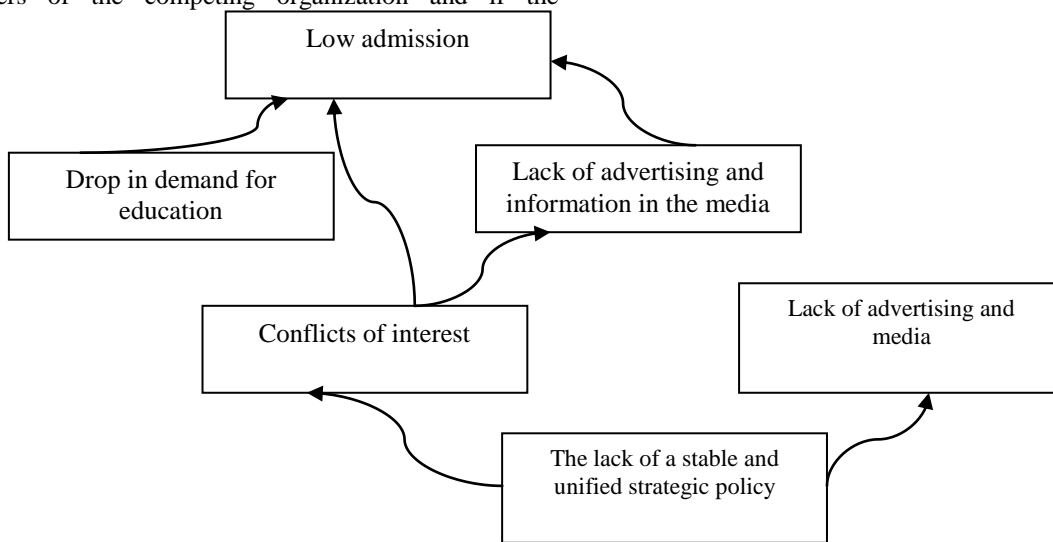


Fig. 2. Map of cause-effect relationships.

The initial data for filling in strengths and weaknesses are the results of PEST-analysis, analysis of the near

environment, analysis of the internal environment, maps of cause-effect relationships.

SWOT analysis →	Strength sides	Weak sides
	Opportunities	Threats

Fig. 3. SWOT Analysis.

Further development of the SWOT analysis can be built around the overlay matrix of external factors of the far and near environments and factors of the internal environment -

SWOT ("Table II"). The location of the intersection of these factors is the area of formation of various strategic initiatives or a portfolio of these initiatives.

TABLE II. SWOT STRATEGY MATRIX

	Threats	Opportunities
Weak sides	Defense strategy	Integration strategy
Strength sides	Optimization strategy	Competition strategy

- Develop a portfolio of strategies. In accordance with [2], [3], a portfolio of strategies is a set of components that are grouped together for the purpose of effective management and for achieving the strategic goals of an organization. A portfolio of strategies may include:
- Defense strategy aimed at transferring branches to other organizations, merging with other educational organizations, closing;
- Optimization strategy aimed at closing non-core areas and specialties, optimization of business processes and structural divisions, reduction;
- Integration strategy aimed, for example, at enhancing network interaction, various types of vertical and horizontal integration;
- Competition strategy is aimed at minimizing costs, diversification, focusing [8].
- It should be noted that the portfolio of strategies requires an accurate approach to its practical implementation, one can even say the auditing approach, taking into account the limited financial resources and infrastructural possibilities and subsequent systematization by goals and indicators.
- To systematize by goals and indicators, various algorithms are used; recently, the balanced scorecard approach has gained the most popularity [4]. The balanced scorecard model has a number of significant advantages that allow you simultaneously:
- To form a list of both financial and other parameters, allowing to measure and monitor educational, scientific and other activities of an educational organization;
- Determine the priority directions of development and create an operational system of control actions in accordance with strategic initiatives;
- Respond promptly to changes in the external and internal environment and track their impact on the strategy target indicators.

The balanced scorecard approach is primarily aimed at optimizing the internal environment of the educational organization and improving internal processes, and it is assumed that all this will contribute to improving the quality of educational services and the attractiveness of the organization for investors. It is the algorithm of the balanced scorecard that allows strategic planning of the development of an educational organization as a whole to decompose into the strategic goals of its structural divisions and measure these goals quantitatively. The balanced scorecard model

should function in the field of continuous monitoring and continuous interaction with the quality management system of the educational organization.

Applying this method in practice it is necessary to take into account a number of difficulties of this model:

- Time-consuming multi-level formulation of strategic objectives;
- High abstraction of strategic objectives at the highest levels;
- Entrepreneurial orientation, without taking into account social and public aspects of the development of the educational organization;
- Target formulation of the task within the framework of processes and specific results, lack of a clear idea of the effectiveness of the organization.

To avoid these difficulties, the use of maps of strategic objectives based on the model of requirements of interested parties will help to some extent [6].

These goals may be indicators for the procedure of ranking components from a portfolio of strategies.

The ranking of projects may well be carried out within the framework of the matrix approach with the establishment of a weighting factor for each component based on the degree of influence of the target groups - the priority of the goals and their indicators, determined based on the requirements of external factors. Obviously, the ranking allows you to exclude the components of the strategy with virtually no effect on the achievement of goals. And here it should be noted that to achieve success in strategic planning, the priority of project decisions within a strategy should not be determined by their importance (political, personal, etc.), but should be based on an analysis of cause-effect relationships. The most convenient way to do this is with the help of such a common tool as a "road map", which is a set of specific targets that need to be achieved in a certain time interval and design decisions necessary to achieve them [4].

IV. CONCLUSION

The above analysis is not complete enough from the point of view of one hundred percent coverage of all existing approaches and methodologies for strategic planning of educational organization development, but it allows a rather topical assessment of the development trends of this issue, assess problems, their causes and develop proposals for their elimination. The priorities of each educational institution are determined not only by the tasks set by the federal and regional ministry of education, they are designated taking into account the personnel and material and technical resources, social, ethnic and cultural characteristics of students and other features of the educational situation in which it operates. Therefore, each strategy will have its own "face" and will differ in direction, goals, objectives and mechanisms of implementation. Based on a well-known typology of educational development strategies (marketing, personnel, structural-functional strategies) [9], [10].

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