

The Nature and Dimensions of Strategic Leadership

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Abstract: *This paper aims to provide an understanding of the nature and dimensions of strategic leadership. It considers the nature of strategy in its broadest sense and puts forward a model of a sustainable strategically focused school. This model encompasses strategic processes and approaches but is driven by strategic leadership. The main thrust of the paper is to examine the personal attributes of strategic leaders and the activities they undertake. It is drawn from our strategy research since the late 1990s.*

Introduction: What is strategy and strategic leadership?

One of the key challenges, when taking up a senior leadership position, is the move from an operational perspective to a strategic perspective. Strategic leadership, by definition, links the strategic function with the leadership function. School leaders articulate the definition of the organisation's moral purpose, which can be considered as 'why we do what we do'. The values that underpin this moral purpose are linked to the vision, considering 'where we want to be and what sort of organisation we want to be in the future'. Strategic leadership is the means of linking this broad activity to shorter-term operational planning, thereby imbuing the responses to immediate events with elements of the value system and the longer-term strategic direction. Strategic leadership is, therefore, defining the vision and moral purpose and translating them into action. It is a means of building the direction and the capacity for the organisation to achieve that directional shift or change. This translation requires a proactive transformational mind-set which strives for something better, rather than the maintenance approach of transactional leadership.

In attempting to define a strategic leadership perspective it is useful to build a broad understanding of strategy. Strategic leaders can use the following ideas to frame an initial understanding of strategy, which can be considered to encompass the following concepts:

- vision and direction setting;
- a broad organisational-wide perspective;
- a three- to five-year perspective;
- a template for short-term action;
- considerable organisational change; and
- strategic thinking more than strategic planning.

In unpacking these ideas it can be seen that essentially strategic leadership is about creating a vision and setting the direction of the school over the medium to longer term. Where the school needs to be and what it needs to provide for its students should be the main focus for the strategic leader. Strategic leaders envisage what a desirable future for the school will be and create strategic conversations to build viable and exciting pathways to create the capacity to achieve that future.

A key shift in the mind-set of leaders who take on strategic roles is that they move away from the operational detailed view and develop a holistic and broad organisational perspective. This presents a challenge as staff often want a detailed step-by-step explanation of the plan for progression, but the necessary broad themes and capacity are only developed as the school moves forward.

The time frame of strategic leadership is notable. There is a danger in incremental approaches that take a detailed view of one year and similarly build an additional year of detail and then another year of detail on top of that. Strategic leadership takes a step back from that and looks three to five years ahead to identify major themes of building blocks to be achieved, then plans backwards from there, leaving the detail to the individual year planning. We would consider it possible for school development or improvement planning to be effective for a two- or three-year period and after that a broad strategic framework needs to be established for years three to five.

It is a mistake to think that operational and strategic perspectives are isolated from each other or that you do one first and then the other. A more useful perspective is to think that strategy provides the framework or template against which to set short-term activities. Strategy can be seen as providing a set of compass points and direction against which short-term activities can be set. The short term and long term should not be seen as sequential, with one done first and then the other; instead, they should be seen as parallel actions with one informing the other. Davies (2006) sees effective strategic leaders as being parallel leaders and not sequential leaders. Thus strategic leaders build a strategically focused school that can be defined thus:

A strategically successful school is one that is educationally effective in the short-term but also has a clear framework and processes to translate core moral purpose and vision into excellent educational provision that is challenging and sustainable in the medium- to long-term. It has the leadership that enables short-term objectives to be met while concurrently building capability and capacity for the long-term. (Davies 2006: 11)

Strategic leaders are involved in taking their organisations from their current situation to a changed and improved state in the future. Change in both the structure and focus of schools is difficult, especially if it involves a change in the culture of the school. Thus strategic leaders are often 'change champions', building coalitions of staff to create conditions for change and embedding new ways of working. In personal terms this often involves leaders in managing conflict and living with the ambiguity of knowing what they want to achieve but not being able to move towards it as quickly as they would like.

Strategic Leadership in Context

This paper argues that to understand the nature and dimensions of strategic leadership it is

necessary to consider the strategic processes and the strategic approaches that leaders involve themselves in, and then the paper will look at the leadership attributes of strategic leaders before providing a taxonomy of what strategic leaders do. This is based on the perspective that a sustainable and successful school has to be strategically focused. This is illustrated by Davies (2006) in Figure 1. This model was based on a major research project undertaken in England for the National College for School Leadership (NCSL; see Davies, Davies & Ellison 2005) and was disseminated in a number of NCSL strategic leadership development initiatives. It is a core part of the Specialist Schools and Academies (England) leadership development programmes and is part of the Victorian (Australia) States' leadership development programme.

Figure 1: Model of a strategically focused school (Davies 2006)



Strategic Leadership Processes

The concept of how you do something is as important as what you do for successful strategic change, and underpins the need to give attention to strategic processes. Eacott (2008) sees strategic leadership moving through five stages: envisioning, engaging, articulating, implementing and monitoring. This is similar to the Davies et al. (2005) approach encapsulated in Davies (2006), which sees strategic leaders constructing a set of strategic processes which involve conceptualising, engaging, articulating and implementing, to which should be added monitoring and evaluating. This paper will use the revised Davies (2006) framework to consider the elements of strategic processes.

If strategy is to move beyond the strategic document that lies on the shelf in the principal's office and is instead a framework that guides current and future action, then how the strategic policy develops is of critical importance. First is the dimension of conceptualisation, which is how strategic leaders understand where they are and where they are going. This encompasses the stages of reflecting, strategic thinking and strategic analysis. Reflection answers the question of where we are now. It is about senior leaders attempting to understand where they are as leaders, where the school team is, and where the organisation is. Making time for reflection is difficult as short-term pressures may intervene.

This process of reflection moves on to a projection forward through the use of strategic thinking which answers the question 'Where could we be?'. Gratton (2000) talks about the capabilities that need to be established to enable this strategic thinking to take place: a visionary capability – school leaders needing to build rich and inclusive dialogues about the

future; a scanning capability – leaders developing an understanding of what the future may bring by establishing a broad and shared understanding of educational and societal trends; and systemic capability – to see the school as a complex organisation and to see what it could become as a whole, not just focusing on part of its activities. These two processes of strategic reflection and thinking are supported by strategic analysis, which answers the question: ‘What do we know?’.

Having worked through the conceptualisation processes, strategic leaders then have to focus on the key process in making strategy work – that of engaging the people in the school to be fully involved and committed. The key to the involvement of staff in the school is strategic leaders initiating strategic conversations. These can be structured discussions and conversations that are part of meetings, but they can also be powerful when they take place informally. A number of significant points can emerge from developing strategic conversations: establishing a common vocabulary, understanding how staff could make things happen, consensus building, outlining staff visions, building reflection, keeping everyone involved, carrying everyone forward.

These strategic conversations link into the process of articulating strategy, which can be in the form of oral communication, as witnessed by formal and informal strategic conversations. The articulation can be aided by how the leadership of the school organise strategic and operational meetings. It can be the simple measure of ensuring that, in meetings on the longer-term strategy, policy issues are separated out from shorter-term operational issues. Alternatively, this separation can take the form of a more radical approach so that different organisational structures encompass both the operational and the strategic dimensions of school life. Finally, articulation takes the form of the written plan.

Implementation is the most difficult part of the strategic process. Writing the plan and making something happen is not the same thing. Davies and Ellison (2003) used the phrase ‘the thicker the plan the less it effects practice’. So the key element of implementation is focus and ensuring that strategy can be seen to be happening. Finally, the strategic processes need to be monitored and evaluated so a feedback loop can occur to improve and adjust the processes.

Moving the discussion forward requires an action and framework, and the next section of this paper will consider three approaches that school leaders use to structure their strategic approaches.

Strategic Leadership Approaches

Strategic planning is a rational, linear approach which assumes that it is possible to define the desired outcomes and plan the stages necessary to get there. Strategic planning needs to be separated from short-term operational planning in that the latter deals with detail and a two-year time horizon while strategic planning has broader, medium-term objectives. Strategic planning would encapsulate a three- to five-year view of broader issues and not the detail of the operational plan, but would act as a template against which to align short-term activities.

In broad terms, a school can, for example, plan student numbers over a five-year period, plan projected income flows, and plan and manage a building project. School leaders can use this strategic planning approach in certain areas to great effect. However the mistake often made is to extend the detail of the operational plan in the belief that it can become strategic in

future years. While school improvement plans may have some currency when extended into the third year, if the level of detail is extended to the fourth and fifth year the approach breaks down. Very often strategy has to be built or crafted as the school moves forward, and this will be considered next.

Emergent strategy assumes that schools often operate in an environment of change and turbulence and have a number of initiatives or events thrust upon them. In such an environment schools do not always have the time to fully understand a new initiative before they have to introduce it. The learning process is through 'learning by doing'. It could be considered a trial-and-error process where the school tries new things, but occasionally finds that some of them do not work so well. With a number of new activities undertaken by the school how can it learn by its experience? It has to set time aside to reflect on its actions; it can see that some actions were successful while others were less so. If a school can analyse experiences, it can determine which actions to repeat in the future (the successful ones) and which actions to abandon (the less successful ones). A pattern of successful behaviour emerges by building up a number of experiences and reflecting on them. By using that pattern of behaviour and actions, the strategy emerges through a reactive approach, which starts to become proactive if schools learn from that experience, and use it to set a framework for the future.

Mintzberg (2003) sees leaders less involved in planning strategy and more involved in crafting strategy. The key to a successful emergent approach is that leaders work to shape and create the future by constantly scanning the environment and analysing their own responses to it. Such an approach is needed because constant initiatives demand constant reappraisal and testing but, at the same time, leaders need to set these activities against a backdrop of futures thinking. As such, emergent strategy has a closer relationship to reality than an approach where strategy is only reconsidered at fixed time intervals.

Strategic intent is used when 'we know what major change we want, but do not yet know how to achieve it – but we will!'. It is a process of setting defined intents or objectives and committing the organisation to a learning and development phase to achieve them. It is a framework for attacking difficult organisational change by energising the organisation into learning how to reach for new and challenging goals.

This form of strategy is very useful in a period of considerable change or turbulence. The planning framework is one in which the senior leadership team, although it is able to articulate what major strategic shifts or changes it wishes to make, is unsure of how to operationalise these ideas. In brief, it knows where it wants to go but not how to get there. Determining the intent may be dependent on leadership intuition as well as leadership analysis. The key to deploying this form of strategic approach is to set targets in the form of strategic intents that stretch the organisation to perform in significantly different or increased levels. The school then engages in a series of capability- and capacity-building measures to 'leverage up' the organisation to produce at the higher level. The 'intent' is the glue that binds the organisation together as it focuses on how to achieve this new strategic outcome. Work by Hamel & Prahalad (1994) and Davies (2006) illustrates the significance of this approach.

When considering these three types of strategic approach it is a mistake to think that school leaders use one strategic approach to the exclusion of all others. In practice school leaders used a combination of strategic approaches in differing circumstances. Strategic planning

may be the preferred approach when there is full knowledge and a time frame that facilitates it. However, given a need to implement a significant change at short notice with little prior knowledge of the area, then an emergent strategy approach would be evident. When the school is attempting to build a major cultural and organisational change by developing the capacity to achieve a significant shift in performance, it would build a series of strategic intents. All these approaches could be used concurrently in response to the challenges and possibilities which face schools, so deploying a portfolio of strategic approaches would be the appropriate response.

The paper will now consider a number of key elements that establish the skills and abilities that strategic leaders need to be effective in the challenging roles that they undertake. We will split this in order to consider the (1) personal attributes of strategic leaders followed by a consideration of (2) what strategic leaders do.

Personal Attributes of Strategic Leaders

An initial consideration from our research on strategic leadership would suggest that there are three underlying characteristics of strategic leaders:

- a. Strategic leaders are strategic thinkers.
- b. Strategic leaders are strategic learners.
- c. Strategic leaders are values driven.

This categorisation builds on the outstanding model presented by Boal & Hooijberg (2001), who bring together a synthesis of strategic leadership research in a meta-analysis by constructing three key functions of strategic leadership as: absorptive capacity, adaptive capacity and managerial wisdom.

Strategic Leaders are Strategic Thinkers

It is vital to think of strategy as aligned to strategic thinking as a means of developing a strategic perspective rather than just the traditional view of strategy being linked to mechanistic strategic plans. Unfortunately, strategy has become synonymous with strategic planning, which is a mistake since strategy is a much wider concept. This concept of strategy is more of a perspective, a way of thinking about things, which is highlighted by Garratt (2003: 2–3), who gives an excellent definition of strategic thinking:

Strategic thinking is the process by which an organisation's direction-givers can rise above the daily managerial processes and crises to gain different perspectives Such perspectives should be both future-oriented and historically understood. Strategic thinkers must have the skills of looking ... forwards ... while knowing where their organisation is now, so that wise risks can be taken while avoiding having to repeat the mistakes of the past.

This definition by Garratt highlights two factors: first, the need to stand above the day-to-day operational issues to look at the bigger picture; second, the need to understand strategy both in terms of where you have been as well as where you are going. This idea of understanding where you have come from as well as trying to understand where you are going is taken up by Mintzberg (2003: 79–83), who articulates strategic thinking as 'seeing'. This involves seeing where you are going (seeing ahead) as well as seeing where you have come from

(seeing behind) and, most significantly, 'seeing it through' to make sure strategy is turned into action. In essence, strategy is the way that we look at the school in the broader context of its current situation and its future direction with the skills necessary to successfully implement any actions.

What are the activities that a strategic leader has to engage in to develop a strategic perspective? The first is scanning. This involves scanning the environment in its political, economic and educational dimensions to identify ideas and trends that will impact on the school in the succeeding years so that strategic leaders can identify them and devise approaches to utilise them and position the school to maximise its future opportunities. Second is envisioning a new and desirable future for the school, based on the information gained from the scanning process and relating that to the school's capacity to change and develop. Third is reframing which is the process of setting the new future in context and finally making sense of that for the staff and students of the school. This often involves engaging in a strategic process and building new mental models.

During this process, of strategic thinking, strategic leaders engage in synthesis as well as analysis. The importance of this is not to break everything down into its component parts and risk 'paralysis by analysis' but to see how the components can fit together and build an integrated successful whole. Effective schools have a success culture which is an integration of a number of elements built up over a period of time. It is this synthesis of good ideas and outstanding practice that come together and create a success culture. What is needed very often is nonlinear as well as linear thinking. Strategic leaders are able to think 'outside the box' and engage in tangential thinking that can incorporate new and innovative ways of doing things. It moves away from the step-by-step incremental approach and breaks new ground by considering different alternative possibilities. Strategic thinking engages the heart as well as the head. It involves the values and beliefs of the strategic leader, which are implicit to the way they think, as much as the more public explanations of policy. Finally, strategic thinking can be visual as well as verbal. The systems thinking concept of rich pictures (Jackson 2003) is useful here. What would a great school look like – how could you see it in terms of its buildings and the interactions of its people? One of the key talents of strategic leaders is that they are able to create rich pictures of the future which individuals can see and understand and so become part of the collective imagination of what is possible in the future.

Strategic Leaders are Strategic Learners

In a strategically focused school the strategic leader is also the lead learner! If the leader is not constantly seeking new knowledge and insights they fail to move the organisation on and importantly fail to provide a model for staff and students. Hughes and Beatty (2005: 74) adapt work from systems theory and apply it to how strategic leaders can learn. Learning for strategic leaders may involve:

- looking at the big picture – what can I learn from the broader environment?
- looking for patterns over time – how can I learn from data and find patterns in the data in order to extract useful information?
- looking for complex interactions – how can I synergise and learn from interrelationships?
- understanding what causes what – learning that it may be more complex than it seems!
- making time for reflection!

Strategic leaders do not leave learning to chance: they set up the organisational framework to ensure it happens for themselves and others. A good way to look at this is to consider the organisational culture, structure and systems which support strategic learning.

Organisational culture sets the tone for how learning is thought of in the school. The culture should be one where learning is seen as integral to the leadership role in order to develop and improve, not something that is a one-off (that once it has been achieved there is nothing more to learn). Is the learning culture that of knowledge transfer, something that you learn and pass on, or is it something where you enquire and develop and share? These cultural frameworks often reflect the difference between shallow knowledge and deep learning. The latter encompasses wisdom and understanding.

Organisational structures also strongly influence the learning of the leaders and the staff and children. If the majority of the time leaders and staff concentrate on operational and task issues and do not prioritise strategic and reflective discussions then clearly little deep learning will take place. Organisational structures such as splitting the strategic and operational functions into different meetings and different review cycles emphasises the importance of the strategic dimension. Underpinning strategic learning at all levels is the practice of strategic conversations. Engaging all the staff in discussions about where the school is, where it needs to go and hence the skills and knowledge we need to learn to achieve progress is a uniting factor. Also, articulating what the strategic leader has or needs to learn is a means of rationalising key concepts for the him or her.

Strategic Leaders are Values Driven

It is important that the strategy process is not seen just as a functional means of moving the school from one stage in its development to the next. The strategy process needs to be based on a series of values and beliefs that aim to improve the lives of children and those who work in the school. Usually we think of having a vision for the school which is based on a set of core values and beliefs.

In a powerful articulation of the difference between leadership and management, Bennis & Nanus (1985: 92–93), in a classic articulation of vision, argue that the creation of a vision and a sense of meaning is one of the distinguishing features of leadership:

By focusing attention on a vision, the leader operates on the emotional and spiritual resources of the organisation, on its values, commitment, and aspirations. ... leaders often inspire their followers to high levels of achievement by showing them how their work contributes to worthwhile ends. It is an emotional appeal to some of the most fundamental of human needs – the need to be important, to make a difference, to feel useful, to be part of a successful and worthwhile enterprise.

Brubaker (2005: 6) supports this perspective, considering that the leader who articulates a credible vision ‘creates conditions under which others feel inspired and committed to something greater than themselves’. He goes on to articulate the need for leaders to ‘communicate their visions in a way that their followers feel new energy and a shared responsibility and a shared accountability’.

Building a set of values and beliefs in an organisation will be successful only if the leader is perceived to be acting within a moral framework. Kouzes & Posner (1999: 49) argue that ‘human beings don’t put their hearts into something they don’t believe in’. Their research

into values puts forward the view that it is the clarity of an individual's values that makes a difference to their level of commitment to the organisation. Where these coincide with the clarity of organisational values then there is the highest level of commitment. Interestingly, where there were high levels of clarity of personal values but some confusion over organisational values there were still high level of commitment, but where clarity of organisational values was not supported by high levels of personal values then commitment was limited. What values or moral characteristics do leaders need to establish the moral culture of the organisation?

Brubaker (2005: 176–181) in discussing the components of the moral culture outline core values that respondents found desirable in ethical leaders. We outline each of them in turn.

- Honesty – that colleagues can rely on what you say is the truth
- Integrity – that words and actions are aligned
- Promise keeping – the ability to deliver on what you agree to do
- Loyalty – to the organisation you work for and the people you work with
- Fairness – you have the same set of expectations from all staff
- Concern for others – in their working and personal lives
- Respect for others – respecting their individual differences and diversity
- Law abiding – operating within the accountability and regulatory frameworks
- Pursuit of excellence – striving for high achievements by all staff and students
- Personal accountability – take responsibility, admit mistakes and share success

In formulating strategy and in enacting strategic leadership the centrality of moral purpose is a defining factor of effective strategic leadership. In an interesting collection of insights, Davies & Brighthouse (2008) highlight the passion of leaders to improve the life chances of the children in their care in their book on *Passionate Leadership*. We will now move the discussion on to what strategic leaders do.

What Strategic Leaders Do

The second main category from our research is that a key set of activities emerge of the activities which strategic leaders undertake. This section will consider the nature and dimensions of strategic leadership by examining what strategic leaders do to promote a strategic approach. Davies (2003: 303) has identified the problem in isolating essential characteristics of effective strategic leaders:

The difficulty in reviewing the literature, or interpreting the results of my current research, is that it is not always easy to distinguish the characteristics of 'good leadership' from those of 'strategic leadership'.

In an attempt to resolve this difficulty it is possible to use the work of Boal & Hooijberg (2001) Bolman & Deal (1991), Sergiovanni (1984), Cheng (2002: 56–57), and Davies and Davies (forthcoming): to establish a useful synthesis of what strategic leaders do:

- a. Strategic leaders create the vision and future direction of the school.
- b. Strategic leaders exert strategic influence.
- c. Strategic leaders are strategic talent developers.
- d. Strategic leaders balance the strategic and the operational.

- e. Strategic leaders deliver strategic action.
- f. Strategic leaders define strategic measures of success.

Strategic Leaders Create the Vision and Future Direction of the School

A valuable and useful definition of vision is provided by Nanus (1992: 8): ‘a vision is a realistic, credible, attractive future for your organisation’. This is supported by writers such as Westley & Mintzberg (1990: 9), who see vision as a ‘desired future organisational state’. Put simply, vision is where you want to be in the future, what your school will look like, how it will feel to be there, what aspirations it will have and what values it will operate by. Nanus (1992: 16–18) articulates the advantage of having a vision for the organisation:

- The right vision attracts commitment and energises people.
- The right vision creates meaning in people’s lives.
- The right vision establishes a standard of excellence.
- The right vision bridges the present and the future.

Gratton (2000: 13) uses powerful images to set the past, present and future in context:

in the memories and commitments of the past, in the excitement of the present, and in the dreams and hopes of the future ... Our memory of the past is balanced by a ‘memory of the future’, captured in our daydreams and the vignettes we paint to think through our options and the way we would like to see our life develop.

This idea highlights one of the key elements of a vision: it creates a sense of meaning and purpose for individuals within the school, and is something to which they can commit.

Baum, Locke & Kirkpatrick (1998) report that what makes a difference to organisational performance is a vision which is brief, clear and desirable, contains relevant imagery, and is communicated and implemented by personal commitment. According to Baum et al., vision is far more powerful than charisma or personality in its effects on the performance and attitudes of followers (Baum et al. 1998). Gill (2001: 2–4) sees the importance of linking vision to strategy:

Without strategies, vision is a dream. Strategies are ways of pursuing the vision, identifying and exploiting opportunities, and responding to threats. ... Strategic plans, however, are merely road maps which rapidly become obsolete. Of more importance in strategic planning than road maps is the compass, which provides direction in line with our vision.

Gill (2001: 2–4) also supports the idea that vision is both rational and emotional:

Creating a vision is an intellectual and entrepreneurial exercise, which requires validity in the minds and hearts of followers for the vision to be an effective driving force. And for it to work, vision has to be translated into action and results. This is done through strategies and communications. Effective leaders communicate a rational appealing vision of the future and show the way through strategies. They ‘do the right thing’.

The overall vision for the school should be a unifying concept, but to make it an ethical or moral vision it needs to be based on a set of values and beliefs.

Strategic Leaders Exert Strategic Influence

Strategic influence is based on how leaders gain commitment to the vision and direction of the school from those who work and learn in the organisation. If the school is not only to achieve improved outcomes and outputs but to do so in a sustainable way, then involving others and getting them on board is critical to its achievement. How can strategic leaders influence others to come on the school's strategic journey? What follows are a number of factors which shape the leader's ability to influence others.

The first part of the influence-building process is to consider how people react to the leader, and therefore the first stage is for the leader to look at his or her own leadership style and skills. Strategic leaders need to build trust with their colleagues and staff so others can believe in their motivations and their integrity. Important in this is how others perceive the leader and how effective he or she is at communicating those values and attributes. This credibility has two components. First, the credibility that comes from expertise and the ability to do the job. Second, the credibility that comes from the character and integrity of the individual.

Strongly linked to this idea is the leader's own passion for education and the role he or she can play in enhancing children's learning and life chances. Effective strategic leaders make opportunities to articulate their passion for education and what drives them to create a sense of moral purpose and establish a credibility base grounded on doing what is best for the students and calling on all staff to make a difference in their interactions and role in the school. Moral leadership clearly needs to go beyond the rhetoric. The expression 'see something – do something about it' is a leadership value that needs to permeate the behaviour of all staff. The leader needs to create a moral purpose that translates ideals into action and is the initial catalyst of influence building.

Influencing others by involving them in the process is the starting place, but there are a number of other significant factors. Clearly building a foundation of understanding across the school is based on clear criteria for success but also on effective relationships so that staff are involved in the process. The ABCD model (Figure 2) illustrates how this can be done.

Figure 2: The ABCD approach (Davies 2006: 93)

Articulate	1	Strategy
Build	2	Images Metaphors Experiences
Create	3	Dialogues – conversations Cognitive/mental map Shared understanding
Define	4	Strategic perspective Outcome orientation Formal plans

The purpose of this is to create a shared language and set of values so that the strategic leader connects to the heart as well as the head. The emotional commitment as well as the logical or rational commitment of staff is vital.

Strategic Leaders are Strategic Talent Developers

Talent management is increasingly seen as a critical factor in developing successful organisations and is a strategic priority for businesses. It is just as critical a factor for schools. The growing leadership skill shortage, difficulty in appointing principals (and other senior leaders) and the work–life balance agenda is leading to a shortage of people who are capable of making a difference to organisational performance. A focus on talent management will contribute to other strategic objectives, such as building a high-performance learning environment and adding value to the school. This is different from simple succession planning and filling typical hierarchal leadership roles that exist today because it is a process of providing able and talented people who will create new and different leadership roles in the future.

This is particularly important for strategic leaders as they meet the challenge of developing innovative and imaginative leaders throughout the organisation to meet the needs of school transformation. Individual schools need to develop a talent pool where staff can be presented with a coherent developmental strategy with planned work opportunities in different contexts. This should provide new staff and middle leaders with institutional leadership opportunities, award-bearing qualifications and in-house development to systematically enhance the talent pool within the organisation.

It is not enough to attract people with high potential; there must be a planned strategy for managing their talents which is supported by processes to retain the commitment of talented people and properly use their abilities. The ability to attract and retain high-quality individuals is a key leadership challenge for strategic leaders. In terms of strategic leaders in schools their role should encompass five elements as defined by Cross (2007: 26) and illustrated in Figure 3.

Figure 3: Talent leadership and management roles

Role	Leadership challenge
Talent Spotter	What talent do I need and how can I spot it?
Talent Coach	How can I bring out the best in people when it matters most?
Talent Blender	How can I blend the available talent to get maximum performance?
Talent Conductor	How can I create a flow of talented people?
Talent Management	What will attract talented people and keep them for longer?

Davies & Davies (2009), drawing on their research for the Specialist Schools and Academies Trust, put forward the view that for effective talent development the following activities are necessary:

- a. Define values and strategy
- b. Ensure rigorous performance evaluation
- c. Challenge performance
- d. Enable rewards to match performance
- e. Establish powerful professional learning
- f. Identify longer-term needs
- g. Identify pedagogic and leadership talent

- h. Become a talent developer and engager
- i. Establish an integrated model of the talent-management process
- j. Establish a talent-management culture

This provides a useful framework for establishing a strategic talent development process in schools. Strategic leadership is about moving the school onto a new and desirable future, and this can only be achieved by having great people in the organisation. Being a talent manager is the cornerstone of a strategic leader’s success.

Strategic Leaders Balance the Strategic and the Operational

There is an assumption that strategy is about the long term and it is incompatible with short-term objectives. There are some basic things that an education system should provide for children. It should provide them with definable learning achievements that allow them to function and prosper in society. Where children are not making the progress we expected for them, they need extra support and educational input to help them realise their potential. This, by necessity, requires regular review against benchmarks. We recognise the danger of seeing short-term benchmarks as the outcomes and not indicators of progress. Indeed, if annual tests were seen as diagnostic and generated learning plans for children rather than outcome scores for schools, the problem of testing might be solved overnight. What needs to be done is that the short term should not be seen as separate from the long term, or as in conflict with it, but as part of a holistic framework where short-term assessments are seen as guides on the long-term journey.

This balanced view of the short-term and long-term perspective can be seen in Figure 4. It is of little use having a long-term strategic plan if it ignores the short term as we see in Figure 4. The result in the bottom right quadrant will be that short-term crises will prevent the long-term goals ever being achieved. Similarly, merely operating on a short-term perspective, the top left quadrant, will prevent long-term sustainability ever being achieved. What is needed is a balance between the short and long term, as witnessed in the quadrant at the top right.

Figure 4: Short-term viability and long-term sustainability (based on Davies 2004)

Operational processes and planning (SDP and target setting)	Effective	<i>Functionally successful in the short term but not sustainable long term</i>	<i>Successful and sustainable in both the short term and long term</i>
	Ineffective	<i>Failure inevitable both in the short and long term</i>	<i>Short-term crises will prevent longer-term sustainability</i>
		Ineffective	Effective
Strategic processes and approaches			

The challenge for strategic leaders is to use the longer-term vision as a template or framework for operational shorter-term actions. Vision that cannot be translated into action has no impact. Similarly, continuing to manage the now without change and development is not building capacity for the future. We need to balance both the long- and the short-term approach.

Strategic Leaders Deliver Strategic Action

Strategy is an attractive concept, and plans and documentation abound in schools. However, the basic question to be asked is do they ever get implemented? And a second question is do they make a difference? In a research interview a very perceptive strategic leader made this comment to us:

It's not good enough just to do that thinking and reflecting ... people actually want to see results!

This quotation articulates the critical importance of the strategic leader: to be effective, he or she has to translate strategy into action. Deciding to do something and actually doing something are very different. A school may have eloquently written plans which do not come to fruition. What are the key things that will make a difference? In terms of implementation, what are the critical factors that will lead to successful implementation?

First is to set clear objectives. The standard leadership maxim 'more from less' is useful here. Schools should focus on the key things that will make a difference and then deliver on them. The volume of the documentation is less important for success than staff understanding and committing to the plan. So a sharp and clear set of objectives that staff can understand and act on is vital. This leads on to the second factor, that of the ability of strategic leaders to align the people, the organisation and the strategy. It is by bringing together these three elements that a strategic leader can translate strategy into action. Very often individuals in organisations can feel that strategy is top down and that they are 'done to' and can end up 'done in'. What is needed is a way of working where the emphasis is 'done with', so an individual and the organisation come together to build the strategy. The third factor is that this can only come into being if strategy is everyone's job and is a learning process. The concept of emergent strategy, where reflection and feedback adjust and change the strategy as the school learns new and better ways of doing things, is a useful way of thinking. Thus a process needs to be established in school for reflection on the effectiveness of strategic actions. This involves assessing what has gone well and less well and what can be learnt for more effective action in the future.

A fourth factor in translating strategy into action is the effectiveness of strategic leadership in delivering strategic change. In doing this strategic leaders need to create the frameworks within which others can act. This involves balancing control and autonomy and developing a risk-taking culture where people are not punished for taking risks, but only for repeating mistakes because they have not learnt from them. In terms of their own leadership skills, strategic leaders need to assess future courses of action and take reasoned decisions based on evidence and data. However, once a decision is made they need to support it wholeheartedly and convincingly and have the courage of their convictions. In moments of uncertainty in strategic change those in the organisation look to the leader, and that leader needs to act decisively in the face of that uncertainty.

Finally, it is worth reminding ourselves that there are always many activities and conversations that leaders can engage in with their colleagues, but deciding which are the

critical ones that lead to translating strategy into action is more difficult. Strategic organisations need three things: focus, focus and focus! This means that leaders need to develop both good content questions and good process questions. Working with colleagues, leaders need to define critical areas for strategic development and then take sufficient time to outline the nature and dimensions of the proposed strategic change, so that a complete picture of the critical factors for implementation can be built up. The other side of the coin to 'what we are doing?' is 'how are we going about it?'. Here leaders need to understand the how of implementation. This involves a process of determining the key factors that need to be communicated in order to gain the commitment of colleagues. We suggest that commitment will be more effective if leaders can identify the main elements of the change but also the main implementation points and the possible problems that may arise.

As well as keeping the focus, keeping the implementation process simple is an important contributor to success. This involves both defining and articulating the key stages and significant points of the implementation strategy. Planning the implementation is as important as planning the content of the strategy itself. Clarity of process and establishing definable outcomes along the way are key elements to build into the overall approach.

Strategic Leaders Define Strategic Measures of Success

How would a strategic leader know their school has been successful in five or seven years' time? Clearly the leader needs to define the strategic measures of success. The leader needs, first, to establish criteria and, second, to find appropriate measures to evaluate whether the criteria have been met. The debate that we 'value what we can measure' rather than 'we measure what we value' is a useful starting point here. It draws into the debate the balance between qualitative and quantitative measures.

Clearly it is important to have hard data such as numbers on roll – without students there is no school. Examination and test results are measures that are used to assess the school; while the results of responses to standardised tests can be reported in a relatively straightforward way they can be made to be more sophisticated by the use of value-added interpretations. While such results can be indicative of underlying ability, they are only 'indicative'; they do not define deep understanding, motivation to learn, or love of the subject area. Other more complex learning, such as social learning, can be witnessed by children's behaviour to each other or towards adults. More complex skills such as problem solving, determination and commitment become more difficult to assess.

A core strategic measure of success could be to create active involvement in sustainable learning for each child. This would start with valuing learning within the school community but, significantly, all children would recognise the need to see learning as an ongoing process throughout their life. The current concern in the UK, and many western countries, regarding the increase in obesity of children and in adults, and the lack of sensible exercise and diet undertaken, is a case in point. The obsession in the USA with team and competitive sports, and to a degree the culture of team sports in UK schools, has set up a culture of reward and success for the few and humiliation for the rest. The success criterion for secondary school sport may not be: 'Did the hockey or football team win the cup?' but: 'How many children are actively engaged in physical exercise five years after they have left school?' We would hazard a guess at less than a quarter and that could be an over-estimate!

Similarly, with staff, an involvement in active professional reflection and dialogue might have several success criteria such as 'Are staff reflective practitioners?' or 'Do they stay after school

and discuss ideas with colleagues and build professional learning communities?'. In terms of organisational learning and development can the school establish a 'no-blame culture' where individuals try new things and learn from their mistakes? This learning approach can be extended so that collaborative cultures are established within the school and between neighbouring schools where staff share success and failures and learn from each other. Building leadership capacity in schools can be seen when individual teachers take more responsibility for their roles – they take decisions rather than having decisions forced on them.

A good way to think about a success culture is that if you arrived in the school five years in the future, what would the school look like? How would it feel to be part of the culture? What successes would the school be celebrating? These 'rich pictures' are part of envisaging success that encompasses the hard data of results and the soft data of attitudes and behaviour as well as expectations and hopes. A key role of the strategic leader is to give voice to those hopes and aspirations by articulating what success would look like and feel like for the school in five years' time. This is the cornerstone of sustainable leadership (see Davies 2007) which underpins the long-term development of the school.

Conclusion

This paper has put forward insights from our research which should assist leaders and potential leaders to reflect on their strategic roles. The challenge facing strategic leaders is twofold. The first challenge is the overwhelming pressure of short-term initiatives. Two decades of major educational reform around the world has caused leaders to respond to multiple innovations, especially in the areas of centralised curriculum, assessment and inspection demands from central government. The 'urgent' agenda imposed on leaders and the increasing accountability demands for managerial responses leave little time for reflection and strategic leadership. The second challenge is that of thinking incrementally and not making 'strategic leaps' to new ways of doing things, which can seriously inhibit transformational educational progress. The first challenge is to find the time to think strategically, the second is to think differently. We hope this paper will encourage school leaders to do both.

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