

Strategic Planning for the Management of Educational Institutions: Sistematic Review

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Abstract

This study aimed to analyze the trends and approaches of strategic planning in the management of educational institutions based on a systematic review of the literature of the last five years. Through a comprehensive analysis of 10 studies, the main challenges and opportunities in the implementation of strategic planning in the educational field were identified. The results of the review reveal the importance of strategic planning as a tool to improve educational quality, optimize resources and respond to the demands of an increasingly complex educational environment. However, recurring challenges are identified, such as lack of staff training, resistance to change and scarcity of resources. The active participation of the entire educational community, the adaptation of strategic plans to the particularities of each context and continuous evaluation are key elements for the success of strategic planning. Furthermore, the study highlights the need to strengthen transformational leadership and take advantage of the opportunities offered by information and communication technologies. In conclusion, strategic planning emerges as a fundamental tool to improve educational quality, but its effective implementation requires a comprehensive approach that considers the particularities of each context and the active participation of all the actors involved. Future research is recommended that delve into aspects such as evaluation, educational innovation and the impact of digital transformation on strategic planning.

Keywords: *Strategic Planning, Educational Management, Educational Quality, Educational Institutions, Challenges.*

Introduction

Strategic planning in educational institutions has become a critical element for continuous improvement and adaptation to contemporary challenges in the educational field (Rivadeneira et al., 2024). Despite its importance, many institutions still face difficulties in implementing planning processes that are effective and aligned with their missions and visions. Therefore, the lack of a systematic approach can result in ineffective management, limiting the ability of institutions to respond to the changing needs of students and society.

Thus, in Peru, strategic planning in the management of educational institutions faces various challenges that limit its effectiveness. Since strategic planning is recognized as a fundamental tool to improve educational quality, however, many institutions still lack a systematic and participatory approach in its implementation (Díaz and Villafuerte, 2022). This may be mainly due to the lack of adequate training for managers and teachers, as well as the scarcity of resources, which are significant obstacles that prevent the formulation and execution of effective strategic plans. Furthermore, the socioeconomic context of the country, marked by educational inequalities and limitations in infrastructure, aggravates the situation, making institutions unable to meet their educational objectives optimally.

Likewise, the recent study by Quispe et al. (2024), points out that school management in Peru is considered deficient and fails to meet the proposed objectives due to the lack of adequate strategic planning. In this context, this deficiency translates into a negative impact on academic performance and student and parent satisfaction. Therefore, it is imperative that Peruvian educational institutions adopt strategic planning

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models that align their actions with the institutional mission and respond to the specific needs of the national educational context.

According to the study by Castiello-Gutiérrez et al. (2022), strategic planning in education has gained relevance as a response to current global challenges, which is why, in many developing countries, such as the Philippines, it has been shown that the development and application of strategic planning are decisive to improve quality of educational institutions. These researches have shown that adequate strategic management allows better coordination between the actors involved and facilitates the achievement of common goals. However, challenges similar to those found in Peru have also been identified, such as the lack of knowledge about the important phases of the planning process and resistance to change by some educational actors (Córica, 2020).

According to Flores (2021), studies carried out in contexts such as Mexico have highlighted the need to continuously transform and evaluate educational quality through strategic approaches. Hence, collaboration between international organizations, such as the Organization for Economic Cooperation and Development (OECD), has been essential to promote educational reforms that promote more effective educational management. However, these initiatives face difficulties due to the cultural and social diversity of each country, which requires a contextualized approach to ensure that the strategies are effective and sustainable.

Given what has been mentioned about strategic planning in educational management both nationally and internationally, it reveals a complex panorama. On the one hand, in Peru structural and training limitations hinder progress towards quality education. In contrast, at the international level, although there are positive examples of effective implementation of strategic planning, the challenges are common and require solutions adapted to each context. Therefore, it is essential to foster a collaborative and participatory approach that involves all educational actors to develop strategies that truly impact positively on the educational system.

Therefore, conducting a literature review on strategic planning in educational management is essential to identify the best practices and approaches that have emerged in the last five years. Hence, this analysis will allow us to understand how the field has evolved and offer practical recommendations for educational leaders seeking to improve their management processes. Furthermore, by focusing on recent studies, the relevance of current trends and their impact on educational quality can be captured. Furthermore, the proposed literature review is based on the need to consolidate and analyze the existing evidence on strategic planning in the management of educational institutions, since it is a topic of increasing relevance in the current context.

In this sense, it is evident that as educational institutions face increasingly complex challenges, such as digital transformation and the need to adapt to the demands of the labor market, it is necessary to have a solid framework to guide their strategic decisions. Therefore, this systematic review will identify best practices and successful approaches, as well as the barriers that institutions have encountered in their implementation. From a methodological point of view, carrying out this review is justified because it is particularly valuable to follow a rigorous and transparent process, in which biases are minimized and the reproducibility of the findings is guaranteed, which strengthens the basis on which informed decisions can be made.

Likewise, by integrating studies from various regions and contexts, it will be possible to offer a more complete and generalizable vision of the impact of strategic planning on educational quality, thus contributing to the development of more effective educational policies adapted to local and international realities. . In this sense, this review aims to fill a gap in the existing literature, as well as provide practical tools for educational leaders seeking to improve their management processes through strategies based on solid evidence.

Based on the above, the following research question is posed: What are the most effective trends and approaches in strategic planning for the management of educational institutions during the last five years? Now, in order to answer the above question, the general objective is proposed to analyze the trends and

approaches of strategic planning in the management of educational institutions based on studies carried out in the last five years. Likewise, the following specific objectives are noted: identify the predominant methodologies in recent literature on strategic planning in educational institutions, identify the common barriers and challenges that educational institutions face when implementing strategic planning processes and determine which countries have researched and published strategic planning for the management of educational institutions during the last five years.

Methodology and Materials

The methodology used for this systematic literature review was a qualitative research approach using the PRISMA (Preferred Reporting Items for Systematic Reviews and Meta-Analyses) method. Because this method provides a structured framework for conducting and presenting systematic reviews, thus guaranteeing the transparency and reproducibility of the findings, which is essential in academic research (Yáñez et al., 2023).

Now, to search for relevant literature on strategic planning in the management of educational institutions, the following databases were selected:

Scopus, which includes peer-reviewed articles in various disciplines, allowing an exhaustive analysis of scientific production.

SciELO, which provides access to scientific journals from Latin America and the Caribbean, focusing on scientific dissemination in these contexts.

Redalyc, which offers access to scientific journals in Spanish, promoting open access and the visibility of Hispanic research.

Dialnet, which brings together scientific literature in Spanish, facilitating access to a wide range of academic documents.

César Vallejo University Library, which despite not being a database as an institutional resource, houses publications and documents relevant to educational research.

In addition, several criteria were considered for the selection of the articles:

Inclusion Criteria

Articles published between 2019 and 2024.

Studies that specifically address the issue of strategic planning in educational institutions.

Documents accessible in the aforementioned databases.

Studies that are scientific articles.

Articles that present quantitative or qualitative results on strategic planning in educational institutions.

Exclusion Criteria

Articles that are not directly related to the educational context or that address topics tangential to strategic planning.

Studies that do not present empirical results or significant analyzes on the impact of strategic planning.

Documents published before 2019.

Studies that do not present relevant results for this research.

Articles that are not available in full text.

Publications without methodological rigor that do not present results.

Documents that do not address study objectives.

Duplicate studies.

To perform the search, the following key terms were used combined with Boolean operators:

Search terms: "strategic planning", "educational management", "educational quality", "educational institutions".

Boolean operators:

AND used to combine terms and ensure that articles include all relevant concepts (example: "strategic planning" AND "educational management").

OR used to include synonyms or related terms (example: "strategic planning" OR "educational planning").

NOT applied to exclude unwanted terms (example: "strategic planning" NOT "company").

The selection process followed the stages of the PRISMA method, beginning with the initial identification of articles through the selected databases. Screening was then carried out based on the titles and abstracts to apply the inclusion and exclusion criteria. Subsequently, the full texts were evaluated to confirm their relevance and methodological quality. Finally, relevant data were extracted for analysis and interpretation. This search and selection process was illustrated in a flow chart Illustration 1 and the relevant results were synthesized in a matrix structure Table 1, for the presentation of the selected articles, in order to record key information, said table includes:

Title of the study

Authors

Year of publication

Methodology used

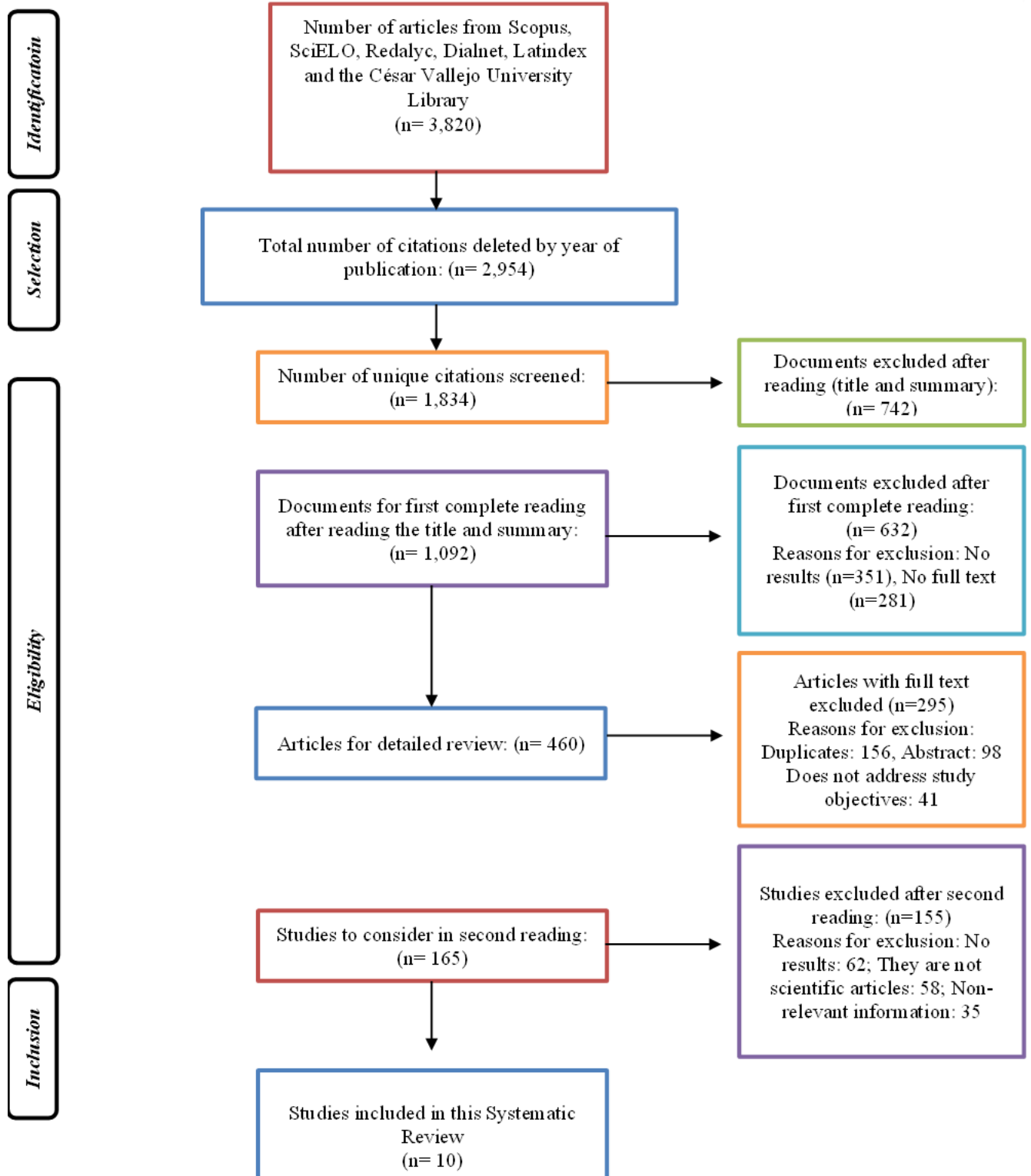
Main results

Relevant conclusions

Results and Discussion

Below is the diagram that illustrates the selection process followed:

Illustration 1 Search diagram



The 10 articles as a result of the systematic literature review are presented in the Table below:

Table 1. Data Extraction

Author(s)	Year	Objective of the Study	Methodology	Results Main	Conclusions
Chica and Erazo	2024	Explore the implementation of strategic planning in universities.	Mixed approach.	The findings indicate that the active participation of the university community is a determining factor for the success of this process.	It was concluded that universities that effectively implement strategic planning experience greater institutional development.
Murillo	2024	Evaluate the understanding and assessment that the different interest groups (internal and external) of the Christian Lyceum have regarding its strategic plans (PEDI and POA).	Quantitative approach, based on the collection and analysis of quantifiable data.	The high participation rate indicates a general receptivity towards the implementation of new strategies and actions proposed in institutional plans.	Cultivating an organizational culture that encourages active participation in strategic planning is essential to ensure long-term success, which involves communicating plans and involving all community members in defining strategies.
Alvarado	2024	Explore the impact of strategic planning on the development of teaching competencies.	Quantitative study with a quasi-experimental design	The results obtained with a sample of 30 teachers, analyzed through statistical tests, support the statement that PE is a valuable tool to strengthen the professional capacities of educators.	Strategic planning contributes to strengthening the skills necessary to face the challenges of contemporary education.
Toala et	2024	Develop an	Qualitative bibliographic	The key	Well-designed

al.		integrated strategic planning model that allows institutions to overcome common challenges and achieve their goals more efficiently.	search, using selection criteria and retrieval of information from documentary sources.	elements of successful strategic planning were identified and a model was designed that would allow institutions to adapt this approach to their own needs and contexts.	and participatory strategic planning can be a powerful tool to drive change and improvement in the education sector.
Huanca and Geldrech	2020	Evaluate the impact of educational planning on improving pedagogical, strategic and operational management in initial educational institutions in southern Peru.	Quantitative research design and statistical data analysis.	The results obtained with a probabilistic sample of 47 teachers indicate that there is a strong positive correlation between PE and the different dimensions of educational management, which suggests that planning is a key factor for institutional improvement.	Improving coordination and coherence in management can help educational planning create more effective and equitable learning environments for all children.
Ledesma et al.	2020	Identify the perceptions of parents about the different aspects of educational community management in the Fe y Alegría Educational Institution No. 4 of Lima Este.	Quantitative approach, descriptive type, non-experimental design, comparative level, cross-sectional through a questionnaire applied to 220 parents.	The results revealed significant differences in the assessment of several factors, in relation to outreach to the community and prevention of risks in the context of the pandemic.	Parents value the different aspects of this management differently, especially those related to outreach to the community and risk prevention.
Paredes-Pérez et al.	2021	Analyze the connection between leadership skills and strategic planning at the Peruvian	Quantitative approach with a correlational design, applied questionnaires to collect data on both variables from a sample of 101 workers from the Peruvian University Los Andes, Ayacucho branch.	The findings revealed a significant relationship between both variables, indicating that	It was concluded that the development of leadership skills is essential for

		University Los Andes, Ayacucho branch, during 2016.		as managers perceive greater management skills, strategic planning becomes more effective.	successful strategic planning in educational institutions such as the Peruvian University Los Andes.
Arroyo	2023	Explore how specialized literature defines and relates the concepts of strategy and tactics in the field of educational planning.	Exhaustive review of the specialized literature on educational strategic planning.	It was found that, although there is a broad consensus on the importance of both concepts and their hierarchical relationship, the publications analyzed do not propose a specific model to design strategies and tactics in the educational context.	The new model for designing strategies and tactics offers a valuable tool to improve the quality of planning in educational institutions.
Vargas et al.	2021	Evaluate the link between strategic planning and teaching collaboration in a parochial school.	Quantitative approach study, correlational type, applied to a population of 50 people.	The results reveal that the majority of teachers (56%) perceive a low level of teamwork in the institution, which indicates a need to improve collaboration between teachers.	Strategic planning seems to be a key factor in promoting teaching teamwork, therefore, good strategic planning favors collaboration between teachers.
Gaete	2023	Determine the degree of incorporation of the concept of social responsibility in the strategic direction of these institutions.	Descriptive study through a mixed content analysis of the strategic plans of a sample of Chilean universities.	Despite the growing importance of social responsibility at the international level, this study reveals that Chilean universities	The research concludes that social responsibility is not yet a fundamental pillar in the strategic direction of Chilean universities.

				have not managed to fully integrate this concept into their institutional practices.	
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Note: Own elaboration

Based on the results of the 10 selected studies, a convergence is observed around the importance of strategic planning to improve educational quality. However, according to Sivathanu and Radhika (2022), there are common challenges that hinder its effective implementation that have been identified in this study, such as lack of staff training, resistance to change and scarcity of resources. On the other hand, it is evident that among the methodologies used, quantitative and mixed designs predominate, which allows obtaining a more complete vision of reality. However, a greater number of qualitative studies are missing that delve into the perceptions and experiences of the actors involved in the planning process.

Likewise, it is interesting to note that several studies highlight the importance of the participation of the entire educational community in the development and execution of strategic plans. This agrees with what was pointed out by Quispe et al. (2024) who indicate that an organizational culture that encourages collaboration and commitment is essential for planning success. It is important to highlight that according to Lucero-Tello et al. (2024) there is a positive relationship between the implementation of strategic plans and the improvement of various aspects of educational management, such as academic performance, student satisfaction and institutional efficiency, which agrees with the results of this study related to the impact of strategic planning. However, it is important to note that these results vary depending on the context and characteristics of each institution.

This systematic review has made it possible to identify the main trends and challenges in the field of educational strategic planning. Thanks to the fact that the results obtained offer a solid basis for the design of policies and programs that promote the continuous improvement of educational institutions. However, more research is required to delve into some aspects, such as the long-term impact of strategic planning and the relationship between planning and other organizational change processes.

Conclusions

Given everything presented in this systematic review, it is concluded that strategic planning emerges as a fundamental tool to improve educational quality and respond to the challenges of today's society. However, its effective implementation requires a comprehensive approach that considers the particularities of each context and the active participation of all the actors involved.

Furthermore, the present systematic literature review confirms the relevance and impact of strategic planning in the management of educational institutions. Thus, this methodological approach has proven to be a valuable tool to improve educational quality, optimize resources and respond to the demands of an increasingly complex and dynamic educational environment.

On the other hand, it should be noted that, despite the benefits evidenced, the implementation of strategic planning in educational institutions faces recurring challenges, such as lack of staff training, resistance to change, scarcity of resources and the difficulty to integrate strategic plans with educational policies at a macro level.

Likewise, it was identified that the main obstacles to the implementation of strategic planning are the lack of training, resistance to change and scarcity of resources. In addition, difficulties were determined in

integrating strategic plans with educational policies at a macro level. Finally, it was determined that the majority of the studies have been carried out in Latin American countries, which suggests the need to expand the research to other cultural and socioeconomic contexts.

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