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METHODOLOGY OF CREATING STRATEGIC AND INVESTMENT PLANS FOR THE DEVELOPMENT OF EDUCATIONAL INSTITUTIONS

Abstract. The purpose of the article is to substantiate the principles and present the author's methodology for creating strategic and investment plans for the development of educational institutions.

The theoretical significance of the article is that it is based on understanding the work of Ukrainian and foreign scientists, the authors' own experience in strategic management of educational institutions of different levels, analysis of experience in creating strategic and investment development plans for 11 vocational schools in Donetsk, Luhansk and Zaporozhye regions (which became possible due to support of UNDP in Ukraine) the principles of creating a strategic and investment plan for the development of educational institutions are substantiated; the author's vision on the technology of strategic management of an educational institution is offered; the author's methodology of creating a strategic and investment plan for the development of an educational institution is presented. The practical significance of the article is that the proposed principles, technologies, tools and methodology tested in educational institutions of different levels can be used in the process of developing strategic management of relevant institutions, in particular to create a document «Strategic and investment development plan of the educational institution».

It is substantiated that in the process of creating a strategic and investment plan for the development of the educational institution it is advisable to adhere to certain principles that will involve all stakeholders, teaching staff, lay the foundation for coordinated work on its (plan) implementation. Such principles are the principle of predictability (vision of the strategic and investment plan for the development of the institution as a document that should not only contain strategic initiatives and operational objectives aimed at changing the current situation (in terms of management, quality, competitiveness, etc.), but to implement initiatives aimed at change in the future); optimality (the need to identify a number of such strategic initiatives, the implementation of which could most optimally determine the change in the future); hierarchy (structuring of strategic and investment plan as a hierarchy of strategic initiatives, strategic goals and operational objectives, in order to ensure and optimal achievement of planned strategic goals); responsibility (involvement of teaching and non teaching staff in the process of generating strategic initiatives for the

development of the educational institution as well as encouraging them to take responsibility for their implementation); environmentality (taking into account the general context (external environment) in which the institution is operated, and which, in turn, determines the patterns and internal logic of this development).

The author's methodology of creating a strategic and investment plan for the development of the educational institution is proposed, which provides the stages of analysis of the external environment of the educational institution, institutional analysis, competitive analysis, formation of a 3D view on the educational institution, generation of strategic initiatives for the future. The peculiarities of using the nominal groups technique to generate strategic initiatives for the development of an educational institution are substantiated.

Keywords: strategic development, strategic management, educational institutions, institutions of professional (vocational) education, strategic and investment plan.

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МЕТОДОЛОГІЯ СТВОРЕННЯ СТРАТЕГІЧНОГО ТА ІНВЕСТИЦІЙНОГО ПЛАНІВ РОЗВИТКУ ЗАКЛАДІВ ОСВІТИ

Анотація. Метою статті є обґрунтування принципів і представлення авторської методології створення стратегічного та інвестиційного плану розвитку закладу освіти.

Теоретичне значення статті полягає в тому, що в ній на основі осмислення напрацювань українських і зарубіжних учених, власного досвіду авторів у стратегічному управлінні закладами освіти різних рівнів, аналізу досвіду створення стратегічних та інвестиційних планів розвитку 11 закладів професійно-технічної освіти Донецької, Луганської та Запорізької областей (за підтримки ПРООН) обґрунтовано принципи створення стратегічного та інвестиційного плану розвитку закладу освіти; запропоновано авторське бачення технології стратегічного управління закладом освіти; представлено авторську методологію створення стратегічного та інвестиційного плану розвитку закладу освіти. Практичне значення статті полягає в тому, що запропоновані принципи, технології, інструментарій та методологія, апробована в закладах освіти різного рівня, може бути використана у процесі розбудови стратегічного управління відповідними закладами, зокрема для створення документа «Стратегічний та інвестиційний план розвитку закладу».

Обґрунтовано, що у процесі створення стратегічного та інвестиційного плану розвитку закладу доцільно дотримуватись визначених принципів, що уможливить залучення всіх стейкхолдерів, педагогічного колективу, закладе основу для злагодженої роботи щодо його (плану) реалізації. Такими принципами є принцип прогностичності (бачення стратегічного та інвестиційного плану розвитку закладу як документа, який має не тільки містити стратегічні ініціативи та операційні завдання, спрямовані на зміну сучасного стану (в аспектах управління, якості, конкурентоздатності тощо), а й передбачати реалізацію ініціатив, спрямованих на зміну стану в майбутньому); оптимальності (необхідність виокремлення тільки таких стратегічних ініціатив, реалізація яких змогла б найбільш оптимальним чином визначити зміну стану речей у майбутньому); ієрархічності (структурування стратегічного та інвестиційного плану як ієрархії стратегічних ініціатив, стратегічних цілей та операційних завдань, з метою гарантованого та оптимального досягнення запланованих стратегічних цілей); відповідальності (залучення членів трудового колективу до процесу генерування стратегічних ініціатив розвитку закладу (у процесі проведення стратегічних сесій), а також спонунання їх до взяття відповідальності за їх виконання); середовищності (урахування загального контексту (зовнішнього середовища), у якому відбувається розвиток закладу, і який, у свою чергу, визначає закономірності та внутрішню логіку цього розвитку).

Запропоновано авторську методологію створення стратегічного та інвестиційного плану розвитку закладу освіти, яка передбачає здійснення етапів аналізу зовнішнього середовища розвитку закладу освіти, інституційного аналізу, конкурентного аналізу, формування 3D погляду на заклад освіти, генерування стратегічних ініціатив розвитку закладу на перспективу. Обґрунтовано особливості використання технології номінальних груп для генерування стратегічних ініціатив розвитку закладу освіти.

Ключові слова: стратегічний розвиток, стратегічний менеджмент, заклади освіти, заклади професійної (професійно-технічної) освіти, стратегічний та інвестиційний плани.

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Introduction. The development of the education system in Ukraine is regulated by the relevant legislation, as well as national strategies for the development of education in Ukraine, state, regional and local target programs, action plans of the local authorities in the field of education, etc. The regulatory framework of Ukraine [1—3] enshrines the basic principles of educational development, including — ensuring the quality of education and quality of educational activities, ensuring universal design and reasonable accommodation, integration with the labor market, financial, academic, personnel and organizational autonomy of educational institutions within the limits set by law, integration into the international educational and scientific space, public-private partnership etc.

The results of the analysis of the conceptual provisions of strategic documents [4—9] allow us to identify the main strategic initiatives in education for the coming years: creating an effective management and funding system, ensuring the content and quality of education to labor market needs, public-private partnership, increase the attractiveness of vocational education. The identified priorities are decomposed into strategic objectives, including the creation of an information management system, approval of regional educational development programs that correlate with relevant regional development programs, ensuring financial, organizational, academic autonomy of educational institutions, creation of training and practice centers and centers of excellence, inclusive and gender-sensitive environment of institutions, development / updating of professional standards on a competency basis, ensuring the functioning of the internal quality assurance systems of educational institutions, organization of internships for teachers, mobility of applicants and teaching staff, development of employers' standards of vocational education, implementation of dual form in higher and vocational education, improving the quality of information products of educational institutions, etc.

The implementation of such ambitious and largely new for educational institution tasks and functions highlights the need of introduction into the management system of the institution of the concept of result-based management, targeted activities to form competitive advantages of the

institutions, introduction of self-organization and self-management processes, strengthening the position of the institutions in the markets of educational and non-educational services. One of the highest priority processes is also to deepen the quality of strategic management, the tool of which is to create a strategic and investment plan of the educational institution.

Analysis of research and problem statement. It should be noted that the issue of strategic development of educational institutions is related to the issue of effective management of educational institutions, which was studied by V. Bykov, O. Borodiyenko, G. Dmitrenko, L. Danylenko, L. Kalinin, L. Karamushka, Y. Malykhina, B. Kobzar, V. Oganegov, V. Oliynyk, V. Lugovyi, T. Lomakina, T. Lukina, O. Novikov, N. Mursalimov, V. Ogarenko, N. Ostroverkhova, E. Pavlyutenkov, M. Potashnik, A. Prokopenko, L. Sergeeva, T. Sorochan, O. Skidina and others. As for the development of a methodology for creating strategic and investment plans for the development of educational institutions, they have not been widely studied by Ukrainian scientists. Exceptions are the works of B. Renkas [10], who reveals the methodology of development a strategy for the general secondary education institutions, as well as the recommendations of the State Service for Educational Quality to develop a strategy for school development [11]. The developers of the methodology advise school principals to develop a strategy for school development according to the following algorithm: first create a working group with the participation of the head, deputies, representatives of the teaching staff, students; then — to conduct a brainstorming session, develop a draft strategy, submit a document for consideration and discussion by the pedagogical council. From our point of view, such an algorithm does not fully take into account current developments in the field of strategic management of educational institutions, does not provide the incorporation of interests of various stakeholders, and does not take into account the possible lack of a systematic vision of the educational market. Thus, the purpose of the article is to substantiate the principles and present the author's methodology for creating a strategic and investment plan for the development of educational institutions.

Research results. The article presents the author's vision of the principles and methodology of creating a strategic and investment plan for the development of educational institutions, formed on the basis of understanding the work of Ukrainian and foreign scientists, the authors' own experience in strategic management of educational institutions of different levels, analysis of experience in creating strategic and investment plans of 11 vocational education institutions of Donetsk, Luhansk and Zaporizhia regions (which became possible due to support of UNDP in Ukraine).

We believe that in the process of creating a strategic and investment plan for the development of the educational institution it is advisable to adhere to certain principles that will involve all stakeholders, teaching staff, lay the foundation for coordinated work on its (plan) implementation. Such methodological principles are:

— predictability. The strategic and investment plan of the institution should not only contain strategic initiatives and operational tasks aimed at changing the current situation (in terms of management, quality, competitiveness, etc.), but also provide for the implementation of initiatives aimed at changing the situation in the future. For example, if demographic studies show a decline in birth rates in a certain region in 2020—2014, the reduction in the number of applicants will be expected in 2027—2031, which forces the educational institution to create conditions to prevent the risk of losing positions by including, for example, a diversification strategy (programs for continuous professional development, participation in the projects etc.);

— optimality. The strategic and investment plan should contain such strategic initiatives, the implementation of which could determine the most meaningful changes in the future. For example, if there is a need to implement new equipment to increase the professional level of practical training of applicants, then such equipment can be purchased (which involves significant investment, the need for installation, maintenance, repair and eventually lead to physical and moral obsolescence in future), lease (which will increase the investment portfolio) or enter into an agreement with enterprises for the internship of students on equipment owned by such enterprises. In each case, decisions must be made based on the principle of optimal use of resources and assessment of possible risks;

— hierarchy. The strategic and investment plan should be organized as a hierarchy of strategic initiatives, strategic goals and operational objectives. Moreover, strategic initiatives are the essences of the highest order; their number is usually not large and provides key areas for change. They, in turn, are decomposed into strategic goals, which contain a set of operational tasks. The number of operational tasks should be such as to guarantee and optimally achieve the planned strategic goals. For example, the main strategic vectors of the educational institution's development can be: to strengthen the capacity and competitiveness in the market of educational services; to ensure high quality of educational services; ensure an effective partnership of the institution with employers and other stakeholders. The first strategic vector — to strengthen the capacity and competitiveness in the market of educational services — is decomposed into the following strategic goals: to optimize and improve infrastructure, modernize the material and technical base of the institution, ensure equal access to education for different categories of population, increase the value of services that the institution provides, to foster the positive image of the institution and attractiveness of professional education in general, to strengthen the project activities of the institution, to increase the managerial capacity of the heads of the institution etc. In turn, these goals are decomposed into operational tasks, which involve the implementation of certain steps;

— responsibility. The implementation of the strategic and investment plan and the achievement of its goals depends on a number of factors, including the belief of the staff of the institution in the value of this document, their motivation to implement certain initiatives and willingness to take responsibility for their implementation. In this context, it is necessary to involve pedagogical and non pedagogical staff in the process of generating strategic initiatives for the development of the institution (in the process of conducting strategic sessions), as well as encouraging them to take responsibility for their implementation. The names of the persons responsible for the implementation of the initiatives should be recorded in the document itself.

— environmentality. To understand the retrospective and current state of development of education institutions, to build strategic initiatives for such development and key strategic priorities, it is important to analyze the general context (external environment) in which the institution operates, which, in turn, determines patterns and internal logic of this development. To comprehensively characterize the set of the most significant factors of environmental impact on the institution, it is advisable to use a tool such as PEST-analysis. In the process of development the development strategy of the institution, the SWOT-analysis is also taken into account, where, S — strengths and W — weaknesses — are determined relative to the institution itself, and O — opportunities and T — threats are determined for the external environment. Therefore, the prism of the analysis of the external environment (and its individual factors) is what opportunities and threats it creates for a particular educational institution. For example, an important factor influencing the strategic development of an institution is the peculiarities of the regional labor market, in particular, the ratio of demand for specialists in a particular field of economic activity/profession and the corresponding supply of labor. The labor market plays an extremely important role in the development of the education system. On the one hand, it is a «consumer» of graduates of institutions, on the other — its features determine the areas and specialties of training, the volume of public procurement of educational services etc. The best option for the interaction of the education system and the labor market should be the correspondence between the needs of the latter and the number of graduates of different professions and specialties.

Determining the strategic vision and long-term trajectory of the educational institution should be based on: approved strategic plans and programs of regional development, regional strategies for reforming the education system at different levels, strategic development plans of relevant territorial communities, the results of institutional analysis (which should be carried out using SWOT-analysis), the results of strategic sessions with stakeholders, surveys of participants of the educational process and employers, as well as based on a number of features of socio-economic development of the region, community and education system, including transformation the structure of the economy of the regions, which causes a change in the structure of employment and determines the characteristics of the demand for specialists; updating of technological processes and equipment in the industrial and service sectors of the economy; increasing demands of employers to

the quality of training of graduates of the institution, to their professional competencies; the need to change the philosophy of teaching, the transition from teaching strategy to learning strategy, the formation of key competencies; formation of flexible approaches to duration, training programs of various categories of the population, in particular socially vulnerable categories of citizens; conceptual awareness of the need to develop the commercial activities of educational institutions by providing additional educational and other services, production and sale of goods; lack of reliable data on the needs in the labor market for qualified personnel in terms of individual professions; the need to implement the idea of organizational, financial, academic autonomy of educational institutions; recognition of the problem of low prestige of vocational education and the negative image of its institutions in the market of educational services, insufficient understanding of their role in the economic development of the region, community and self-realization of the individual.

In our opinion, the development strategy of an educational institution should include the following processes: analysis and assessment of the external environment in which the institution operates; analysis of forecasts and determination of possible directions of development of the institution taking into account external conditions and internal possibilities; definition, classification of tasks of the institution, which reflect its interests, the interests of the educational and the labor market; analysis of the specifics of internal business processes in the institution; identification of alternative ways (or the most probable scenarios) of institution development; substantiation of the institution's development strategy and creation of the document «Strategic and investment plan for the institution's development». Therefore, the author's methodology of creating a strategic and investment plan for the development of an educational institution involves the following stages: analysis of the external environment of the educational institution, institutional analysis, competitive analysis, forming a 3D view on the educational institution, generating strategic initiatives. Only with the comprehensive implementation of all the proposed stages is it possible to create a relevant document that will be the basis for effective strategic development of the educational institution in the future.

The basis of the development strategy of the educational institution is the so-called institutional analysis, which aims to assess the capabilities of the institution in the existing political, economic and legal field, the impact of the external environment on the educational process and its ability to carry it out. Institutional analysis involves: characterization of political and economic factors that affect the functioning of the institution (in terms of macro-, meso- and microlevel); assessment of regulatory and legal support of the institution; determination of competitive strategies for the development of the institution (the so-called strategic set); determination of optimal forms of organization of the educational process; choice of organizational structure of the institution; assessment of strengths and weaknesses of the institution, human resources, staff qualifications, managerial and administrative capabilities of all participants in the educational process. As a result of institutional analysis, a strategy for the development of an educational institution is formed as a general comprehensive plan for achieving its goals. It is characterized by long-term and the introduction of certain innovations in operation of the institution (innovative development is provided through the allocation of resources, adaptation to the external environment, coordination of the institution, anticipation of future changes in activities etc.).

The process of managing the competitiveness of an educational institution includes the following actions: monitoring the competitive environment and assessing the competitive position of the institution in the market of educational services in the region; diagnosing the competitiveness of the institution and its main rivals; competitive positioning of the institution — the choice of strategic units and structures with competitive advantages; development of the concept and strategy of managing the competitiveness of the institution; implementation of the competitive strategy of the institution. Components of the process of ensuring the competitive advantages of an educational institution are marketing tools (in particular, benchmarking) as a continuous improving process of providing educational services. In management, benchmarking is considered as a special procedure for introducing into the practice of the institution technologies, standards and methods of work of the leading organizations/institutions [12]. This is an effective method of improving the activities of the institution, based on creative thinking and adaptation of the experience and best practices of leaders.

In the process of substantiating the strategy of development of the institution it is also advisable to take into account possible ways of development of its competitive advantages:

— leadership in specialization (when the institution offers a unique service that has no alternatives in the relevant market; in this case, there is a need to focus on unique programs, professions, including integrated). An example of such specialization is, for example, the Mariupol Vocational Lyceum of Motor Transport, which has a specialization that is unique not only for the region but also for the country as a whole. The institution is the only one in Ukraine that trains gas rescuers; the only one in the region that trains truck and hydraulic lift truck drivers, bulldozer drivers, excavator drivers, metal ship hull assemblers, ship mechanics [13];

— leadership in price (when the cost of educational services is lower than the market average in the region; in this case, there is a need to focus on reducing the costs of training (so called cost cutting);

— leadership in individualization (when educational services are maximally individualized, adapted to the individual educational needs of different groups of the population; in this case it is necessary to concentrate on modular programs, partial qualifications, individual, distance and mixed forms of education; institutions can provide training which leads to both state certification (diplomas) and local certification (certificates of professional development); a separate area of activity may also be the certification of a specialist from vendor companies (for the operation of equipment, services, etc.) For example, Mariupol Vocational Lyceum of Motor Transport provides vocational training, advanced training for adult population in 28 professions. For each type of training in each profession it was developed, agreed with the customer companies and approved programs, working curricula in accordance with the Standard basic structure of curricula for the preparation of qualified workers in vocational schools (order of the Ministry of Education and Science of Ukraine № 947 of 13.10.2010), the State standard of vocational education. Training is carried out both under agreements with the enterprises (METINVEST-PROMSERVICE LLC, Ilyich-Agro Donbass LLC, UKRAZOV-VM PFC LLC, TECHNOSERVICE LLC, TECHNOMASHSTROY LLC «PREST COMPANY», LLC «ENERGONALADKA», LLC «AZOVTRANSGROUP», LLC «AzovElectroStal», LLC «SPETSMASHINA», LLC «METID'A», PJSC «VKF UNIPROM» and others), and under agreements with individuals. Retraining and advanced training programs are customized and take into account the views of customers on the duration, content and quality of the educational process [13].

The so-called 3D (3-dimensional) view on the educational institution in the process of creating a strategic and investment plan for its development which allows to look at its (institution) activities from the perspective of various stakeholders (participants in the educational process — students, teachers, management; employers; local government representatives, etc.) whose goals and needs are different [12]. Since the ultimate goal of the educational institution is to train competitive professionals to ensure regional labor markets, it is obvious that it is necessary for different parties to look at similar processes in the institution. An effective tool to implement a 3D view on the educational institution is a survey (questionnaires for different categories of respondents should be created, and questions are formed so that respondents describe their attitude to the same phenomena — the quality of training, its compliance with employers' requirements, material technical base of the institution, the quality of teaching staff, promising areas of development of the institution, etc.), analyze and compare the data obtained, make conclusions about the need for changes in one direction or another. Thus, the results of a survey of 638 employers in Donetsk region showed a low level of their satisfaction with the quality of training of skilled workers in vocational education institutions, a low level of satisfaction with the level of cooperation with such institutions, low willingness to work together to improve the quality of training in educational institutions. Understanding this leads to the need to implement such strategic initiatives that would eliminate the negative factors and help improve these processes in the future.

To substantiate strategic initiatives for the development of an educational institution, a strategic session should be held, to which representatives of various stakeholders should be invited: heads and teachers of the institution, representatives of local governments, employers, unemployment centers etc. In the process of interaction with the participants of the strategic session,

the nominal group technique should be used. This technique is a structured process of collective decision-making by a group of experts (nominal group), which includes the stages of generating ideas, their disordered enumeration, structuring and systematization, argumentation and discussion, as well as ranking. This technique help to avoid the pressure and subjectivity of expert decision-making. The expediency of using such a technique is determined by its specificity: due to the use of the nominal group technique it is possible to minimize or even avoid procedural losses that usually occur in other types of collective intellectual activity. In addition, the inclusion in the expert group of specialists in various fields allows to analyze the existing problem (in this case, the strategic vectors of development of educational institution) from different points of view. The participants of the strategic session are invited to name three priority areas of change, the implementation of which, in their opinion, will significantly improve the position of the institution in the market of educational services and increase the attractiveness of their educational offer. In total, participants are usually offer about 30—40 ideas for improvement. The next stages of work are acquaintance of participants of strategic session with the offered ideas, their structuring, association of similar ideas, argumentation by participants of value and priority of strategic vectors of development of educational institution.

Conclusions. The analysis allowed us to draw the following conclusions: in the process of creating a strategic and investment plan for the development of the educational institution it is advisable to follow certain principles that will involve all stakeholders, teaching staff, lay the foundation for coordinated work on its (plan) implementation (predictability, optimality, hierarchy, responsibility, environmentality); determining the strategic vision and future trajectory of the educational institution should be based on approved strategic plans and programs of regional development, regional strategies for reforming the education system at various levels, strategic development plans of relevant territorial communities, results of institutional analysis, results of strategic sessions with stakeholders and employers, based on a number of features of socio-economic development of the region, the territorial community and the education system; the process of identifying the development strategy of an educational institution should include processes of analysis and evaluation of the external environment in which the institution operates, analysis of forecasts and determination of possible directions of development of the institution taking into account external conditions and internal capabilities as well as needs of labor market, analysis of the specifics of internal business processes in the institution, identification of alternative ways (or most likely scenarios) of institution development, substantiation of the institution development strategy and creation of the document «Strategic and investment plan for institution development»; the author's methodology for creating a strategic and investment plan for the development of educational institutions involves the implementation of such stages as analysis of the external environment of educational institutions, institutional analysis, competitive analysis, forming a 3D view on the educational institution, generating strategic initiatives of development for the certain prospective.

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