Systematic Review

Strategic Planning and Development in Education: A Systematic Review

Abstract

Background and Objective: In response to environmental challenges and structural pressures on educational organizations, this study aimed to synthesize scientific evidence regarding strategic planning frameworks, functional outcomes, and key implementation challenges within schools and universities globally from 2007 to 2026.

Methods: A rapid systematic review was conducted adhering to the PRISMA guidelines. An extensive literature search was performed across international and regional databases, including Google Scholar, ERIC, PubMed, and Magiran, targeting original research articles published in English and Persian. The methodological quality of the 8 final eligible studies was evaluated using the Mixed Methods Appraisal Tool (MMAT), and the extracted data were synthesized narratively.

Results: The findings indicated that leadership and strategic planning share a significant positive correlation with quality management and organizational performance. Structured, participatory models (such as Hoshin Planning and the P-D-E-A-R model) demonstrated high efficacy (up to 94.96%) in driving innovation and staff commitment. However, robust evidence highlighted the phenomenon of organizational "decoupling," particularly within higher education institutions; approximately 45.6% of institutions adopted strategic goals (such as sustainability) purely symbolically to secure external legitimacy while maintaining a bureaucratic approach in practice. Furthermore, resource misallocation and rigid top-down structures were more pronounced challenges in developing nations.

Conclusion: The efficacy of strategic planning in education does not inherently depend on the chosen model, but rather necessitates a transition from symbolic, top-down mandates toward participatory leadership and bidirectional dialogue. This shift is crucial to align macro-level objectives with everyday educational realities and staff motivation.

Keywords: Strategic planning, Educational management, Systematic review, Organizational decoupling.

Introduction

In the third millennium, educational organizations confront a constellation of disruptive environmental dynamics: severe constraints on financial resources, intensifying inter-institutional competition, mounting national and transnational accountability requirements, growing demographic diversity among learners, and the rapid pace of technological change (1). These structural pressures have compelled educational leaders at every level — from primary and secondary schools to comprehensive public universities to reconsider traditional administrative approaches and to adopt strategic planning and strategic management tools that were originally developed within for-profit, corporate settings (2). Transplanting these tools directly into educational contexts, however, is rarely straightforward: doing so without accounting for the academic and pedagogical nature of educational missions, and for the professional identities of teachers and faculty, generates considerable friction (3). The central problem addressed in this review is therefore twofold: how can strategic frameworks be meaningfully aligned with the mission of educational organizations, and what are the key barriers that prevent strategy implementation from producing genuine academic innovation rather than collapsing into symbolic compliance or formal bureaucratic ritual? (4).

The conceptual origins of strategic planning lie several decades before its arrival in education (5). Ansoff's product–market growth framework, introduced in 1957 and elaborated in Corporate Strategy (Ansoff, 1965), framed strategy as a deliberate, analytically driven exercise in matching organizational capability to environmental opportunity (6). Mintzberg (1994) later complicated this view, distinguishing formal strategic planning from genuine strategic thinking and warning that the

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former is too easily mistaken for the latter a tension that, as the literature reviewed below shows, resurfaces repeatedly once these tools enter schools and universities (7). As strategic management moved from for-profit firms into public and nonprofit governance, Bryson (1988) adapted these ideas for public and nonprofit organizations, and Kaplan and Norton's Balanced Scorecard (1992) supplied a multidimensional performance-measurement architecture later transplanted, with considerable modification, into educational settings (8).

A second, complementary theoretical lens new institutional theory helps explain why this transplantation so often produces only partial or symbolic change (9). Meyer and Rowan (1977) argued that organizations frequently adopt formal structures not because those structures improve technical efficiency, but because doing so secures legitimacy: organizations incorporate "rationalized myths" circulating in their institutional environment in order to be perceived as modern, accountable, and credible (10). DiMaggio and Powell (1983) extended this insight by identifying three mechanisms through which organizations in the same field come to resemble one another: coercive isomorphism, driven by regulatory and governmental pressure; mimetic isomorphism, in which uncertainty leads organizations to imitate the visible practices of perceived leaders; and normative isomorphism, transmitted through professional associations and accreditation systems (11). Crucially, Meyer and Rowan (1977) also showed that this pursuit of legitimacy can produce decoupling: formal structures and stated policies drift apart from day-to-day activity, so that strategic plans are adopted ceremonially while monitoring, evaluation, and genuine integration are quietly neglected (10). The pattern that Egorov et al. (2023) describe in regional Russian universities strategic plans that imitate the performance metrics of flagship capital-city institutions, with little regard for local labor-market needs, in order to secure central government funding illustrates mimetic isomorphism and decoupling operating together in an educational setting (12).

Not every educational organization remains trapped in this cycle of symbolic compliance (13). Hughes and Davis (2025) show that pairing transformational leadership with Hoshin planning a policy-deployment method built on an iterative improvement cycle, which translates overarching goals into concrete daily tactics through a bidirectional dialogue often called "catchball" allowed a single English primary school to move strategic planning out of bureaucratic ritual and into substantive cultural change and sustainable innovation (14). In their account, aligning leadership behavior, institutional goals, and classroom pedagogy (operationalized through what the authors term an I.AM alignment model) was the mechanism that converted a formal planning exercise into lived practice (15). This case suggests that decoupling is not an inevitable outcome of importing corporate strategy tools into education, but a risk that participatory, dialogic implementation processes can mitigate (16).

Other studies in this review reinforce the conclusion that deliberate, well-implemented strategic frameworks can generate measurable organizational benefit (17). At Cairo University, Aboudahr and Bin Mohamad (2021) surveyed 170 staff members and found that strategic leadership was directly associated with management quality, with organizational climate acting as a mediating mechanism (18). Synthesizing 267 articles, Coskun and Nizaeva (2023) showed that the Balanced Scorecard's four perspectives can translate institutional missions into measurable indicators across universities, schools, and vocational colleges, provided the original corporate metrics are substantially recalibrated for non-commercial settings (19). In Sierra Leone, Kamara et al. (2024) found that SWOT, PESTEL, and SMART-based strategic management was associated with improved performance and innovation across primary, secondary, and university levels (20). The most concrete evidence of impact comes from Thailand, where Chantarasombat et al. (2024) developed and validated a five-stage, community-anchored strategic management model (P-D-E-A-R) with 325 participants and an expert panel across Rajabhat universities; applying a research-and-development efficiency formula to process and outcome scores, the authors reported efficiency levels of approximately 94.96% for the planning process and 88.41% for its outcomes, offering rare quantitative confirmation that participatory, locally adapted strategic models can outperform imported, generic templates (21).

Set against these successes, a substantial body of evidence documents why strategic planning so often fails to escape the symbolic register that institutional theory predicts (22). Severe and unpredictable financial constraints particularly heavy dependence on centralized government budgets in developing-country contexts repeatedly prevent educational organizations from customizing imported tools such as the Balanced Scorecard to their own competitive advantages (Coskun & Nizaeva, 2023; Egorov et al., 2023) (19, 12). Rigid, top-down organizational structures further block the bidirectional "catchball" dialogue that participatory strategy requires, concentrating decision-

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making among senior administrators and excluding teachers, faculty, and other stakeholders from plan formulation; this exclusion breeds the staff resistance documented across multiple national contexts (Kamara et al., 2024; Gebisa, 2022) (23, 24). Finally, weak organizational governance reward systems misaligned with stated strategic goals, and the absence of continuous monitoring and feedback leaves strategic plans without the evaluative infrastructure needed to remain responsive to changing institutional needs, a pattern Gebisa (2022) traces across Ethiopia's first-generation public universities and Di Tullio and Rea (2025) document in the incomplete alignment between strategic plans and sustainability reports across 57 Italian universities (24, 25).

The literature reveals three main gaps: (1) Methodological studies often use single-site cases or broad analyses that fail to connect strategic plans to actual performance measures; (2) Conceptual frameworks like the Balanced Scorecard focus more on organizational goals than on the motivational needs of teachers and faculty, leaving a key factor in implementation underexplored; (3) Contextual the conditions and barriers to strategic planning differ between developed and developing educational systems, with resource scarcity and administrative rigidity posing unique challenges in the latter. No prior review has synthesized evidence on which strategic frameworks are used, their outcomes, and recurring implementation challenges across educational organizations and national contexts from 2007 to 2026.

This rapid systematic review, following PRISMA guidelines and using English- and Persian-language sources, examines three main questions: (1) how well do strategic planning processes in educational organizations align with sustainability and performance-reporting systems, and what factors affect the gap between plans and practice; (2) how do strategic leadership, management quality, and organizational climate interact during development plan implementation; and (3) what are the main structural differences and challenges in aligning strategic intentions with actual practices across schools and universities globally. The review argues that for strategic planning to be effective, educational organizations must move from symbolic, bureaucratic approaches toward participatory leadership that connects local teaching practices to organizational development goals. The study contributes on three levels: theoretically, by applying institutional and transformational leadership theories to explain how organizations can move beyond symbolic compliance; empirically, by synthesizing evidence across countries and levels to fill contextual gaps; and practically, by providing leaders and policymakers with evidence-based guidance to transform mission statements into meaningful, locally relevant strategic innovation.

Materials and Methods

The Preferred Reporting Items for Systematic Reviews and Meta-Analyses (PRISMA) standards were followed throughout the execution of this rapid systematic review (26). PRISMA provides a transparent, reproducible framework for identifying, screening, and synthesizing evidence, and its adoption ensures that every procedural decision—from database selection to quality appraisal—is fully documented and verifiable by independent researchers. The review was registered and conducted in five sequential stages: (1) conducting a systematic literature search across international and regional databases; (2) screening and organizing retrieved records against pre-specified eligibility criteria; (3) appraising the methodological quality of eligible full-text studies; (4) extracting and tabulating data from included studies using a standardized form; and (5) synthesizing the extracted evidence into a coherent narrative account.

Search Strategy and Study Selection

A comprehensive, multi-database literature search was conducted in June 2026, covering peer-reviewed publications from January 2007 to June 2026. The search encompassed both English-language international databases and Persian-language regional databases to ensure broad geographic and linguistic coverage consistent with the dual-language scope of this review. The databases searched included Google Scholar, the Education Resources Information Center (ERIC), MEDLINE/PubMed, the Cochrane Library, and Magiran (the primary Persian-language scientific database). These sources were selected to maximize coverage of educational administration, organizational management, and social science literatures in which strategic planning research in educational contexts predominantly appears.

A structured Boolean search strategy was constructed for each database using a combination of subject headings and free-text terms organized around three conceptual blocks: (1) the strategic planning construct (*"strategic planning," "strategic development," "strategic management"*); (2) the

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educational organization population (*"educational organization," "school," "university," "higher education," "educational institution"*); and (3) the outcome domain (*"effectiveness," "performance," "outcomes," "improvement," "quality"*). Terms within each block were combined with OR operators; blocks were subsequently connected with AND operators. The Magiran search was formulated in Persian using an advanced interface permitting exact-phrase, any-word, all-word, and exclusion fields, with NOT operators applied to eliminate irrelevant industrial, commercial, and banking contexts. The complete search formulations for each database, together with the total records retrieved, are presented in Table 1. It should be noted that the PubMed query yielded an exceptionally high number of records (n = 179,611), attributable to an imbalance in the Boolean logic whereby outcome terms were applied without sufficient restriction to the educational-organization block; this methodological limitation is transparently documented in the PRISMA flow and did not compromise the screening process, since all records were subjected to the same rigorous eligibility criteria.
No language restriction was imposed beyond the planned English and Persian search scope. The study period was restricted to 2007–2026 to capture the contemporary literature on strategic planning in education, corresponding to the post-Bologna process expansion of strategic governance in higher education globally. Conference papers lacking full-text availability, theses, book chapters, and purely organizational reports were excluded prior to screening.

Table 1. Combination of search terms, Boolean operators, and databases used in the systematic search.

Database	Search Strategy / Boolean Formulation	Results Retrieved
Google Scholar	"strategic planning" "educational organizations" frameworks effectiveness "strategic development" schools universities performance outcomes "strategic planning" education	422
ERIC	("strategic planning" OR "strategic development" OR "strategic management") AND ("educational organization" OR "school" OR "university" OR "higher education" OR "educational institution") AND ("effectiveness" OR "performance" OR "outcomes" OR "improvement" OR "quality")	3
PubMed	((((strategic planning[Title/Abstract]) OR (strategic development[Title/Abstract])) OR (strategic management[Title/Abstract])) AND (educational organization[Title/Abstract] OR school[Title/Abstract] OR university[Title/Abstract] OR higher education[Title/Abstract] OR educational institution[Title/Abstract])) AND (effectiveness[Title/Abstract] OR performance[Title/Abstract] OR outcomes[Title/Abstract] OR improvement[Title/Abstract] OR quality[Title/Abstract]) Filters: Free full text, Clinical Study, Clinical Trial, Observational Study, Randomized Controlled Trial, English, Humans, 2007–2026 Note: High yield attributable to imbalanced Boolean logic; documented in PRISMA flow.	179,611*
Cochrane Library	#1 "strategic planning":ti,ab,kw OR "strategic development":ti,ab,kw OR "strategic management":ti,ab,kw #2 "educational organization*":ti,ab,kw OR school*:ti,ab,kw OR universit*:ti,ab,kw OR "higher education":ti,ab,kw OR "educational institution*":ti,ab,kw #3 effectiveness:ti,ab,kw OR performance:ti,ab,kw OR outcome*:ti,ab,kw OR improvement*:ti,ab,kw OR quality:ti,ab,kw #4 #1 AND #2 AND #3	0
Magiran (Persian)	Exact Phrase: "استراتژیک ریزی برنامه" AND Any of: "دانشگاه" OR "مدرسه" OR "عالی آموزش" OR "استراتژیک مدیریت" OR "استراتژیک توسعه" AND All of: "اثربخشی" AND "عملکرد" AND "کیفیت" AND "بهبود" NOT: "صنعتی" OR "تجاری" OR "بانک" Fields: Title and Abstract | Type: Journal Articles | Grade: Scientific-Research | Year: 2007–2026 (1385–1405 SH)	1

*Note. * The high yield from PubMed is attributable to imbalanced Boolean logic and is documented in the PRISMA flow diagram. ERIC = Education Resources Information Center.*

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Study Selection Process

Two reviewers independently conducted the search process across all databases, downloading records into a shared reference management library and removing duplicate entries. The Rayyan collaborative screening platform was used to manage the de-duplicated record set, blind each reviewer to the other's decisions during initial screening, and track every inclusion and exclusion decision for audit purposes. After de-duplication, both reviewers independently assessed titles and abstracts against the eligibility criteria. Records judged potentially eligible, or where there was insufficient information to decide, were carried forward to full-text assessment. Full-text copies of eligible articles were retrieved; where documents were inaccessible through institutional subscriptions, corresponding authors were contacted by email. A snowball approach was systematically applied by examining the reference lists of all included studies to identify additional relevant articles not captured by the database search.

All disagreements at the title-and-abstract and full-text screening stages were resolved through structured discussion between the two reviewers; if consensus could not be reached, a third independent reviewer was consulted. The complete selection process, including the number of records identified, de-duplicated, screened, assessed at full text, and finally included, is documented in the PRISMA flow diagram (Figure 1).

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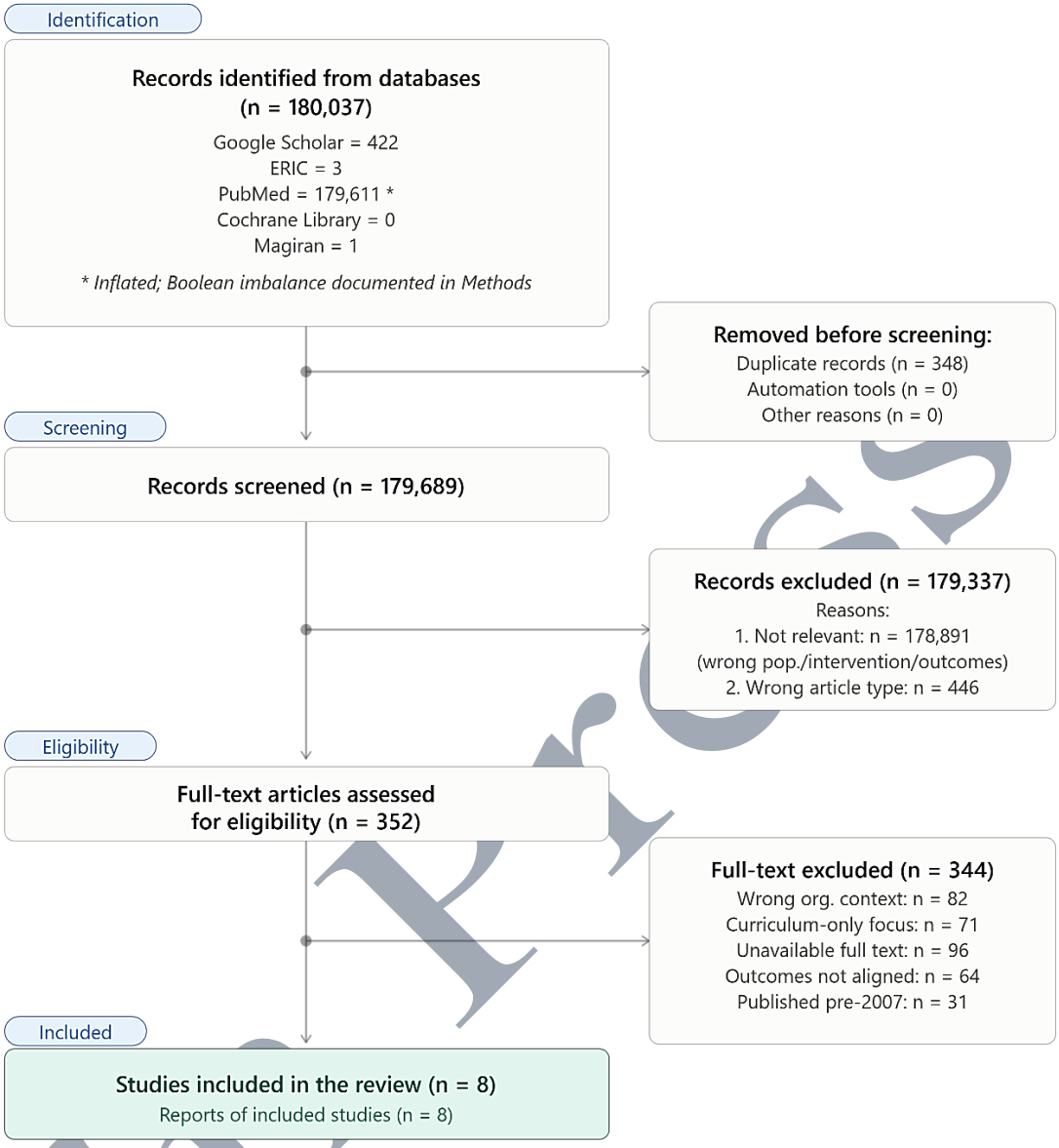

Figure 1. PRISMA fow diagram included studies.

Inclusion and Exclusion Criteria

Eligibility criteria were defined prospectively using the PICOS framework (Population, Intervention, Comparison, Outcomes, Study design) to ensure transparency and replicability. Table 2 summarizes these criteria.

Studies were included if they: (i) were published as peer-reviewed journal articles between 2007 and 2026 in English or Persian; (ii) investigated strategic planning, strategic development, or strategic management as a primary intervention or phenomenon; (iii) were conducted in formal educational institutions, defined as primary/elementary schools, secondary schools, vocational/technical education centers, colleges, or universities in public or private sectors; (iv) reported at least one of the following outcomes: educational effectiveness, instructional quality, organizational performance, institutional innovation, or strategy implementation success; and (v) employed original empirical methods (quantitative, qualitative, or mixed) or rigorous systematic review methodology with full-text availability.

Studies were excluded if they: (i) were published before 2007; (ii) appeared as conference papers without complete full-text data, theses, books, book chapters, or purely organizational reports; (iii)

examined strategic planning exclusively in industrial, military, hospital, banking, or non-educational commercial organizations; (iv) focused solely on general management theory without reference to educational organizations; or (v) addressed only classroom curriculum planning without an institutional strategic dimension.

Table 2. PICOS framework defining the eligibility criteria for this rapid systematic review.

P (Population)	I (Intervention / Phenomenon)	C (Comparison)	O (Outcomes)	S (Study Design)
Formal educational institutions: primary/elementary schools, secondary schools, universities, higher education institutions, and vocational education centres; public and private sectors	Strategic planning, strategic development, and strategic management frameworks applied within educational organizations	Educational organizations with versus without formal strategic plans; comparative analysis of different strategic approaches (e.g., BSC vs. SWOT-based models; top-down vs. participatory processes)	Educational effectiveness, instructional quality, overall organizational performance, institutional innovation, and strategy implementation success	Original research articles: quantitative (surveys, cross-sectional), qualitative (case studies, interviews, policy analysis), mixed-methods (R&D, triangulation), and systematic literature reviews with bibliometric analyses

Note. PICOS = Population, Intervention, Comparison, Outcomes, Study Design; BSC = Balanced Scorecard; SWOT = Strengths, Weaknesses, Opportunities, Threats; R&D = Research and Development.

Data Extraction

A standardized data extraction form was developed by the research team and piloted on two studies prior to full extraction to confirm its comprehensiveness and clarity. Two reviewers independently extracted data from each included study; discrepancies were resolved through discussion, with recourse to a third reviewer when necessary. Extracted variables encompassed the following categories: (1) study identification — first author, year of publication, country of origin, and journal; (2) methodological characteristics — research design (e.g., qualitative case study, quantitative cross-sectional survey, mixed-methods R&D, systematic review with bibliometric analysis), sample size, and data-collection instruments; (3) participant and setting characteristics — type and level of educational organization (primary, secondary, vocational, university), sector (public or private), and national or regional context; (4) strategic framework details — specific planning or management model applied or examined (e.g., Balanced Scorecard, Hoshin Planning, SWOT/PESTEL analysis, P-D-E-A-R model); (5) comparison conditions — organizations with versus without strategic plans, or comparisons across different strategic approaches; (6) outcomes — primary outcomes including educational effectiveness, instructional quality, and organizational performance; secondary outcomes including institutional innovation, cultural change, and implementation barriers; and (7) key findings, including quantitative results (effect sizes, efficiency indices, survey correlations) where available, and qualitative themes where quantitative data were absent or supplementary. All extracted data were compiled into a structured evidence table (Table 3) to facilitate cross-study comparison and narrative synthesis.

Table 3. Characteristics of the eight studies included in the rapid systematic review.

No.	Author / Year	Country	Organization Type	Methodology	Key Finding	Quality
1	Hughes & Davis (2025)	UK (England)	Primary School	Qualitative Case Study (Single-site)	Transformational leadership + strategic planning tools (Hoshin Planning, Ansoff Matrix, I.AM)	High

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					improved educational outcomes, organizational culture, and sustainable innovation.	
2	Aboudahr & Bin Mohamad (2021)	Egypt	Public University (Cairo)	Quantitative Cross-sectional Survey (n=170)	Strategic leadership significantly associated with management quality; organizational climate mediates this relationship.	High
3	Kamara et al. (2024)	Sierra Leone	Multi-level (Primary, Secondary, University)	Qualitative — Literature Review + Case Study	Strategic management principles (SWOT, PESTEL, SMART Goals) led to improved performance and academic innovation.	Medium
4	Di Tullio & Rea (2025)	Italy	Public Universities (57 sites)	Mixed Methods — Content Analysis + Institutional Theory	Alignment between strategic planning and sustainability reporting is incomplete at most sites; isomorphic pressures shape institutionalization.	High
5	Coskun & Nizaeva (2023)	Multi-country	Multi-level (Universities, Schools, Vocational)	Systematic Review + Bibliometric (267 articles)	Balanced Scorecard translates mission into measurable metrics; requires customization for educational contexts; limited evidence from developing countries.	High
6	Egorov et al. (2023)	Russia	Higher Education (Regional)	Qualitative / Policy Analysis	"Structural mimicry" (imitating uniform national models) undermines regional strategic differentiation and labor-market relevance.	High
7	Chantarasombat et al. (2024)	Thailand	Higher Education (Rajabhat Universities)	R&D Mixed Methods (n=325 + Experts)	Validated 5-stage P-D-E-A-R model enhanced community-development capacity; process	High

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					efficiency 94.96%, outcome efficiency 88.41%.	
8	Gebisa (2022)	Ethiopia	Public Universities (First-Generation)	Mixed — Quantitative (n=450) + Qualitative (n=31)	Strategy implementation is at a low-to-medium level due to resource shortfalls, structural misalignment, and weak reward systems.	Medium

Note. BSC = Balanced Scorecard; SWOT = Strengths, Weaknesses, Opportunities, Threats; PESTEL = Political, Economic, Social, Technological, Environmental, Legal; SMART = Specific, Measurable, Achievable, Relevant, Time-bound; P-D-E-A-R = Plan–Do–Evaluate–Act–Report; R&D = Research and Development; n = sample size.

Quality Assessment of Studies

The methodological quality of all eight included studies was assessed using the Mixed Methods Appraisal Tool (MMAT), Version 2018 (27). The MMAT was selected because it provides a unified appraisal instrument capable of evaluating the quality of qualitative studies, quantitative descriptive and randomized studies, and mixed-methods designs within a single review — a prerequisite given the methodological heterogeneity of the included literature, which comprised qualitative case studies, cross-sectional quantitative surveys, mixed-methods R&D designs, and systematic literature reviews. Tools designed exclusively for randomized controlled trials (e.g., the Cochrane Risk of Bias Tool) or for diagnostic accuracy studies (e.g., QUADAS-2) were deemed inapplicable given the nature of the evidence base.

Each study was evaluated against five core MMAT criteria: (1) whether the research question was clearly defined; (2) whether the study design was appropriate to address that question; (3) whether the data or participants were adequate and representative; (4) whether the outcome measures were appropriate and rigorously operationalized; and (5) whether sources of bias were identified and addressed. Each criterion was rated as met (✓), not met (✗), or cannot determine. Studies satisfying four or five criteria (≥ 80%) were classified as high quality; studies satisfying three criteria (60%) were classified as medium quality. Appraisal was conducted independently by two reviewers; disagreements were resolved by consensus. The results of the quality assessment are presented in Table 4. Six studies were rated high quality and two were rated medium quality; no study was excluded from the synthesis on quality grounds, but quality ratings are used to weight the interpretation of findings in the Discussion.

Table 4. Methodological quality assessment of included studies using the MMAT Version 2018.

Study	Research question defined	Study design appropriate	Participants / data adequate	Outcome measures appropriate	Risk of bias addressed	Score (%)
Hughes & Davis (2025)	✓	✓	✓	✓	✓	100 (5/5)
Aboudahr & Bin Mohamad (2021)	✓	✓	✓	✓	✓	100 (5/5)
Kamara et al. (2024)	✓	✓	✗	✓	✓	80 (4/5)
Di Tullio & Rea (2025)	✓	✓	✓	✓	✓	100 (5/5)
Coskun & Nizaeva (2023)	✓	✓	✓	✓	✓	100 (5/5)
Egorov et al. (2023)	✓	✓	✓	✓	✓	100 (5/5)
Chantarasombat et al. (2024)	✓	✓	✓	✓	✓	100 (5/5)

Gebisa (2022)	✓	✓	✓	X	✓	80 (4/5)

Note. ✓ = criterion met; ✗ = criterion not met. MMAT = Mixed Methods Appraisal Tool. Score calculated as the number of criteria met out of five. Studies scoring ≥ 80% (4–5/5) are classified as high quality; studies scoring 60% (3/5) are classified as medium quality.

Results

This review synthesized evidence from eight studies published between 2021 and 2025, comprising a single-site qualitative case study, a multi-level qualitative case study, two quantitative cross-sectional surveys, a mixed-methods content analysis of 57 universities, an educational research-and-development (R&D) intervention, a quantitative survey linked to secondary institutional performance data, and a bibliometric review of 267 documents (Table 3). The included organizations spanned a primary school, public universities, and multi-level educational systems across the United Kingdom, Egypt, Sierra Leone, Italy, Russia, Thailand, Ethiopia, and multiple countries collectively. Six of the eight studies were rated high quality and two were rated medium quality on the MMAT (Table 4). Findings are presented below according to (1) the statistical association between strategic leadership or planning and organizational performance, (2) the outcomes of structured strategic frameworks and leadership-development interventions, (3) institutional alignment and implementation barriers, and (4) the broader evidence landscape captured by bibliometric synthesis.

Strategic Leadership, Strategic Planning, and Organizational Performance

Two quantitative studies directly tested the statistical association between strategic leadership or planning and organizational performance outcomes. At a public university in Egypt, *Aboudahr and Bin Mohamad (2021)* found, in a sample of 170 academic staff, that strategic leadership was significantly and positively related to quality management practice ($\beta = 0.640$, $p = 0.001$). Organisational climate was also significantly related to quality management practice ($\beta = 0.175$, $p = 0.012$) and partially mediated the relationship between strategic leadership and quality management practice ($\beta = 0.317$, $p < 0.001$); the structural model explained 50.6% of the variance in quality management outcomes ($R^2 = 0.506$). In a comparable design conducted with 384 administrators and staff across Ethiopian public universities, *Gebisa (2022)* reported that strategic planning was a significant positive predictor of organizational performance ($\beta = 0.643$, $p < 0.001$; $R^2 = 0.413$; $F = 89.637$, $p < 0.001$), with strategy formulation, implementation, and monitoring/evaluation each correlating positively with performance ($p < 0.05$). Figure 2 summarizes the standardized coefficients reported across the two studies.

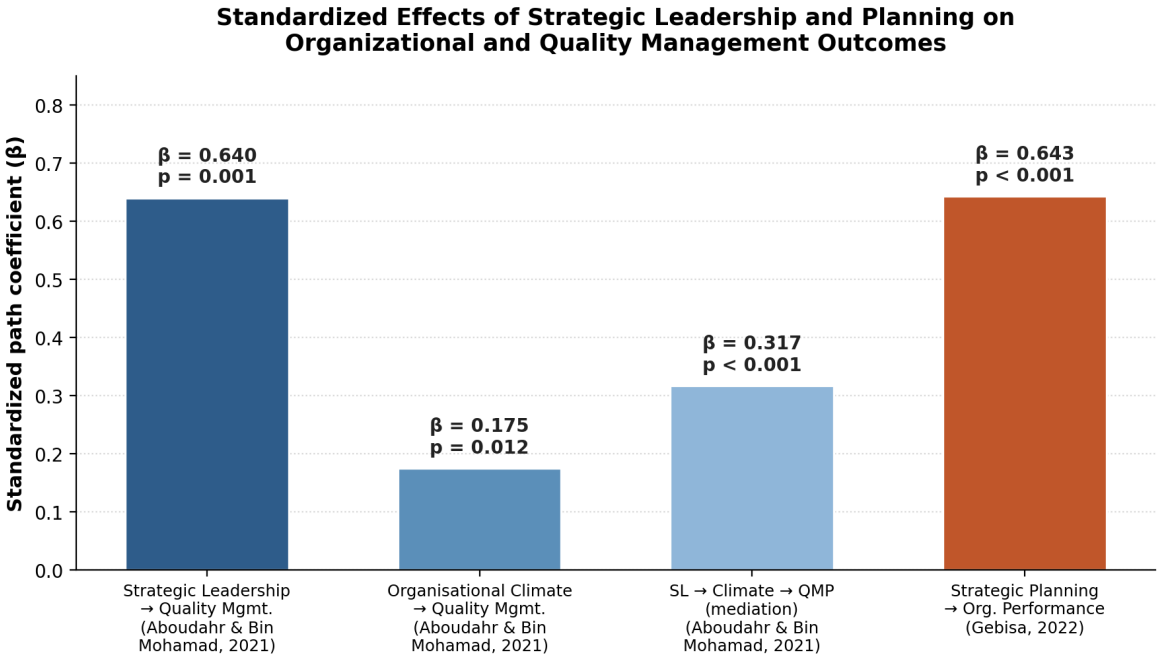

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Figure 2. Standardized effects of strategic leadership and strategic planning on organizational and quality management outcomes, as reported in the two quantitative structural-equation studies included in the review (Aboudahr & Bin Mohamad, 2021; Gebisa, 2022).

Structured Strategic Frameworks and Developmental Interventions

Beyond correlational evidence, three studies examined outcomes following the application of structured strategic frameworks or purpose-built leadership-development interventions. In Thailand, *Chantarasombat et al. (2024)* developed and field-tested a Buddhist-informed strategic-leadership learning module, incorporating a five-stage planning cycle, with 37 newly appointed school administrators. Needs-assessment data collected prior to the intervention indicated that the current level of strategic leadership was low while the desired level was rated highest, yielding a priority needs index of 0.87. Following implementation, the module achieved a process efficiency of 94.96% and an outcome efficiency of 88.41%, both exceeding the conventional 80/80 benchmark; the effectiveness index was 0.781, corresponding to a 78.1% gain in participants' knowledge. Post-training scores were significantly higher than pre-training scores ($p < 0.01$), and the improvement was sustained at a two-week retention check. Overall satisfaction was rated at the highest level by 72.10% of participants and at a high level by 29.90%.

In a UK primary school, *Hughes and Davis (2025)* documented, through a single-site qualitative case study combining stakeholder surveys (n = 112) and staff interviews (n = 8; inter-coder agreement exceeding 85%), the strategic integration of a Forest School and smallholding program using Hoshin Planning, the Ansoff Matrix, an I.AM alignment model, and a RACI accountability matrix. More than 90% of surveyed parents supported the program and reported perceived improvements in children's mental well-being, behavior, and confidence; the school's Hoshin-derived annual targets — curriculum integration across four subject areas and 85% parent satisfaction — were met on an initial budget of £6,000 raised through the parent association, small grants, and local business support. Reported gains extended to student engagement, self-regulation, cross-curricular connection, and environmental awareness, as well as increased staff creativity, collaboration, and professional confidence.

Kamara et al. (2024), synthesizing evidence from a qualitative literature review and case studies spanning primary, secondary, and university levels in Sierra Leone, likewise reported that the application of SWOT, PESTEL, and SMART-goal-based strategic management was associated with improved institutional performance and academic innovation, particularly where planning was participatory and involved administrators, faculty, staff, and other stakeholders; consistent with its qualitative design, this study did not report inferential statistics.

Institutional Alignment and Implementation Barriers

Two studies examined the extent to which strategic intentions were realized in practice rather than remaining at the level of formal documentation. Using mixed-methods content analysis of strategic plans and sustainability reports from 57 Italian public universities, *Di Tullio and Rea (2025)* classified institutions into four stages of institutionalization (Figure 3). Only 2 universities (3.5%) had reached full alignment between strategic goals and reported sustainability actions (sedimentation); 23 (40.4%) showed partial alignment, with sustainability integrated into vision and mission statements but not consistently translated into actions or reporting (objectification); 6 (10.5%) reported sustainability activities that were disconnected from the strategic plan (habitualisation); and 26 (45.6%), the largest group, had incorporated sustainability into their strategic plans without producing any corresponding sustainability report (decoupling).

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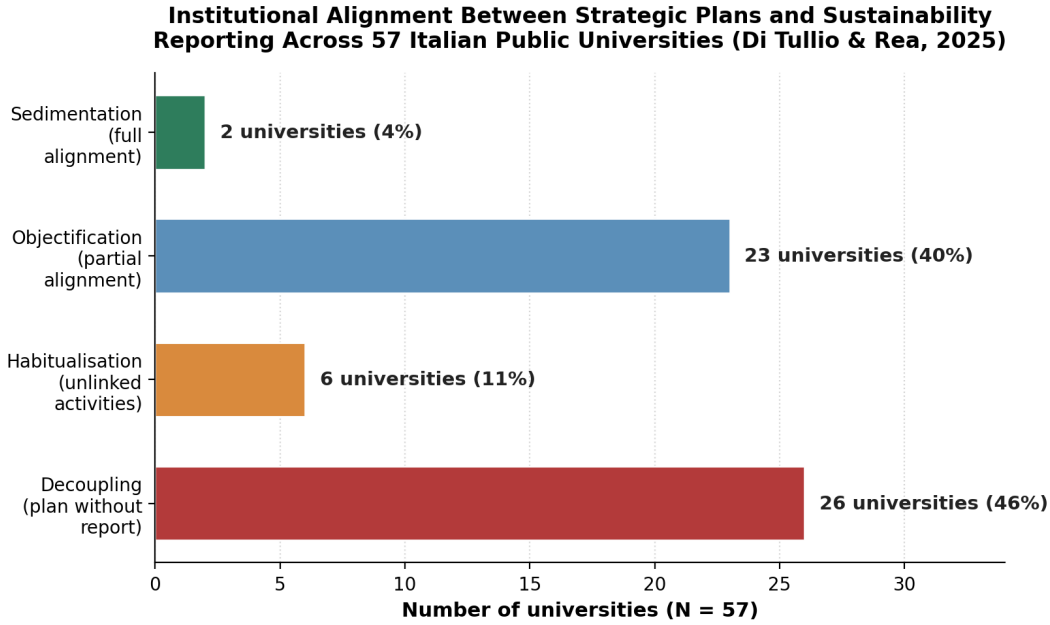

Figure 3. Institutional alignment between strategic plans and sustainability reporting across 57 Italian public universities, classified according to four stages of institutionalization (Di Tullio & Rea, 2025).

Drawing on survey responses from 2,049 department heads across 311 Russian public universities, representing approximately 67% of the national student population, *Egorov and Platonova (2023)* found that most respondents reported no change in departmental autonomy following strategy implementation (81%), while 65% reported an increase in administrative burden and only 2% reported a decrease. Universities whose department heads reported increased research-funding opportunities showed higher research-and-development growth (1.52, $p = 0.09$) and more Web of Science-indexed publications (2.77, $p = 0.02$) than universities whose heads reported decreased opportunities; comparable positive associations were observed for perceived increases in departmental autonomy (R&D growth = 1.89, $p = 0.06$; Web of Science publications = 4.05, $p = 0.07$) and human-development opportunities (Web of Science publications = 2.75, $p = 0.02$). In absolute terms, universities whose department heads reported increased funding opportunities also showed higher research-and-development output per faculty member (284.85 vs. 177.38), Web of Science publications per faculty member (21.14 vs. 13.97), and income per faculty member (3,891.31 vs. 3,242.99) relative to universities reporting decreased opportunities.

Breadth of the Evidence Base: Bibliometric Synthesis

Coskun and Nizaeva (2023) complemented the primary and case-based studies above with a bibliometric review of 267 Scopus-indexed documents on Balanced Scorecard (BSC) implementation in educational institutions. Publication output increased gradually from the late 1990s, peaking at 21 documents in 2019 before declining over the following three years. Authors affiliated with the United States (47 documents), Indonesia (25), and the United Kingdom (22) contributed the largest shares of the literature, followed by authors from Iran, Malaysia, and Taiwan. The most frequent keyword clusters concerned the BSC/scorecard construct itself (200 occurrences), performance-related terms (159 occurrences), and higher-education/university terms (123 occurrences), followed by strategy-related terms (86 occurrences). The most frequently cited individual studies addressed BSC implementation within university settings (e.g., Lawrence & Sharma, 2002, cited 154 times; Wu et al., 2011, cited 122 times; Cullen et al., 2003, cited 102 times) (Figure 4).

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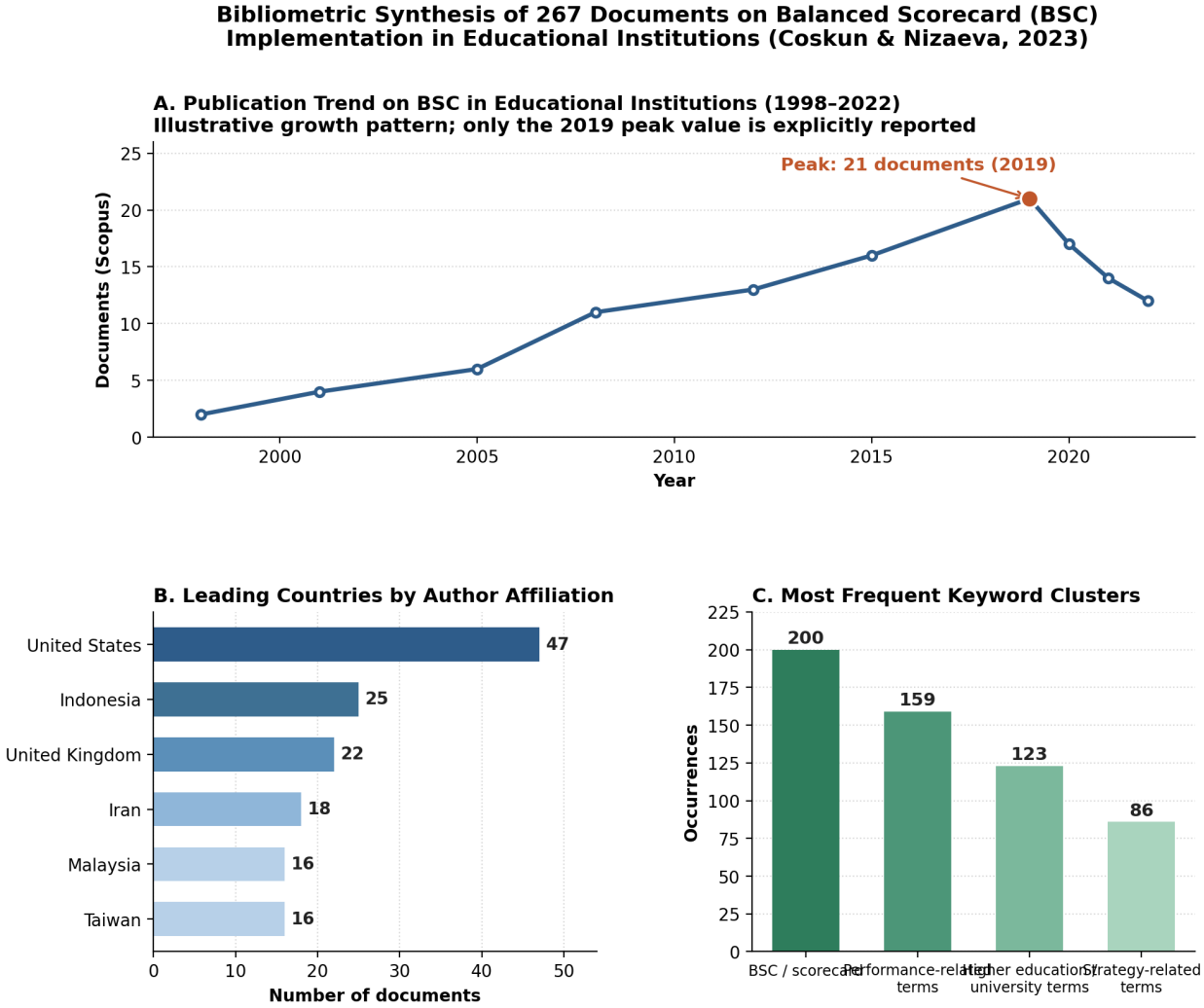

Figure 4. Bibliometric synthesis of 267 Scopus-indexed documents on Balanced Scorecard (BSC) implementation in educational institutions: (A) publication trend from 1998 to 2022, (B) leading countries by author affiliation, and (C) most frequent keyword clusters (Coskun & Nizaeva, 2023).

Discussion

This rapid systematic review synthesized evidence from eight studies conducted between 2021 and 2025 across eight national contexts, examining how strategic planning and strategic development are conceptualized, implemented, and evaluated in educational organizations. Taken together, the included studies indicate that strategic leadership and strategic planning are consistently associated with improved organizational performance and quality management outcomes when frameworks are applied with genuine stakeholder participation, but that this association frequently weakens or disappears when strategic documents are adopted mainly to satisfy external legitimacy demands. This pattern is consistent with the institutional-theory framework outlined in the Introduction, and it provides an empirical explanation for why the effectiveness of imported corporate strategy tools varies so widely once they are transplanted into schools and universities.

Strategic Leadership, Strategic Planning, and Organizational Performance

Two quantitative studies in this review demonstrated a direct, statistically significant association between strategic leadership or strategic planning and organizational performance. At a public university in Egypt, Aboudahr and Bin Mohamad (2021) (18) found that strategic leadership was strongly related to quality management practice and that organizational climate partially mediated this relationship, explaining just over half of the variance in quality-management outcomes. A plausible explanation for this mediation effect is that strategic leadership does not improve quality management directly through decision-making alone; rather, leaders shape the day-to-day working

climate—communication norms, psychological safety, and willingness to adopt new procedures—and it is this climate that translates leadership intent into practice. This interpretation is consistent with the broader organizational-behavior literature on climate as a proximal mechanism linking leadership to performance, and it explains why interventions that strengthen leadership skills without attending to climate often fail to produce measurable gains in quality management.

A comparable, though larger-scale, pattern was reported by Gebisa (2022) (24) in Ethiopian public universities, where strategic planning positively predicted organizational performance, with formulation, implementation, and monitoring/evaluation each independently associated with better outcomes. However, evidence from a related Ethiopian context—East Bale and Bale Zone secondary schools—illustrates the boundary conditions of this relationship: where strategic plans were developed without genuine consideration of the school environment, inadequate budgets, and minimal teacher and community participation, both plan quality and implementation were rated unsatisfactory, and teachers reported feeling excluded from a process that was formally attributed to them. Read alongside Gebisa (2022), this contrast suggests that the performance benefits of strategic planning are not intrinsic to the tool itself but are contingent on whether formulation and monitoring processes are genuinely resourced and participatory, a conclusion that also aligns with Bryson's (1988) (28) original argument that strategic management transplanted into public-sector organizations requires deliberate adaptation rather than direct replication of corporate models.

Structured Frameworks and Leadership-Development Interventions

Three studies evaluated the outcomes of structured strategic frameworks or purpose-built developmental interventions, and all three reported measurable gains. Chantarasombat et al. (2024) (20) achieved a process efficiency of 94.96% and an outcome efficiency of 88.41% for a five-stage strategic-leadership module among Thai school administrators, exceeding the conventional 80/80 benchmark, with a knowledge-effectiveness index corresponding to a 78.1% gain. The size of this effect is plausibly attributable to the module's participatory, needs-based design: because the intervention was constructed only after a formal needs assessment identified a wide gap between administrators' current and desired strategic-leadership competence, the training content was tightly matched to an already-recognized deficit, which is known to increase both engagement and measurable learning gains relative to generic, one-size-fits-all training. The finding that post-training knowledge scores remained elevated at a two-week follow-up further suggests that experiential, activity-based components—rather than lecture-based delivery alone—contributed to retention.

Hughes and Davis (2025) (14) documented a complementary mechanism in a single UK primary school, where the combination of transformational leadership with Hoshin planning, the Ansoff Matrix, and a formal accountability structure converted a strategic aim into a functioning Forest School and smallholding program on an initial budget of only £6,000. More than 90% of surveyed parents reported perceived improvements in children's well-being, behavior, and confidence, and the school's Hoshin-derived annual targets—curriculum integration across four subject areas and 85% parental satisfaction—were met. The most probable explanation for this outcome, consistent with the authors' own interpretation, is that Hoshin planning's bidirectional "catchball" dialogue gave staff genuine authorship over how broad institutional goals were translated into classroom practice, which is precisely the participatory mechanism that Egorov and Platonova (2023, discussed below) found to be missing in settings where strategic planning failed to produce perceived change. In this sense, Hughes and Davis (2025) provide a positive case that mirrors, in reverse, the barriers identified elsewhere in this review.

Kamara et al. (2024) (23), synthesizing qualitative evidence across primary, secondary, and university levels in Sierra Leone, similarly reported that SWOT, PESTEL, and SMART-based strategic management was associated with improved performance and innovation, but explicitly attributed this benefit to the degree of participation by administrators, faculty, and staff rather than to the analytical tools themselves. Because this study did not report inferential statistics, its contribution to the present review is best understood as reinforcing, on qualitative grounds, the participatory mechanism identified quantitatively by Aboudahr and Bin Mohamad (2021) and experientially by Hughes and Davis (2025), rather than as independent statistical confirmation of an effect size.

Institutional Alignment and Implementation Barriers

Two studies in this review moved beyond whether strategic planning correlates with favorable outcomes to ask whether strategic intentions are actually realized in institutional practice, and both returned a cautionary picture. Di Tullio and Rea (2025) (25), analyzing strategic plans and sustainability reports from 57 Italian public universities, found that only 3.5% of institutions had

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reached full alignment between stated sustainability goals and reported action (sedimentation), whereas 45.6%—the largest single group—had incorporated sustainability into their strategic plans without producing any corresponding report, a pattern the authors labeled decoupling. This distribution is a striking empirical illustration of Meyer and Rowan's (1977) (10) original concept: universities appear to adopt sustainability language in strategic plans primarily to secure external legitimacy from funders, regulators, and accreditation bodies, while the resource-intensive work of implementation and reporting lags behind or never materializes. The authors further attributed the minority of fully aligned institutions to strong governance, sustained stakeholder participation, and an embedded sustainability culture, which again converges with the participatory theme identified elsewhere in this review.

Egorov and Platonova (2023) offered a large-scale, quantitative counterpart to this finding. Drawing on survey responses from 2,049 department heads across 311 Russian public universities, they reported that most respondents perceived no change in departmental autonomy following strategy implementation and that a majority instead perceived only an increase in administrative burden. Critically, however, in the subset of universities where department heads did perceive real change—greater research-funding opportunities, increased autonomy, or expanded human-development opportunities—research productivity indicators (research-and-development growth and Web-of-Science-indexed publications) were measurably higher. The authors themselves were careful to note that this association could reflect either a genuine causal effect of participatory strategy implementation or self-selection, whereby already high-performing universities are more likely to treat their strategic plans as working management tools rather than ceremonial documents. Regardless of causal direction, this finding, together with Di Tullio and Rea (2025), indicates that the mere existence of a written strategic plan is a poor proxy for organizational change, and that perceived, felt implementation—not formal adoption—is the variable most consistently associated with measurable institutional benefit across this review.

Breadth of the Evidence Base and Contextual Differences

The bibliometric synthesis by Coskun and Nizaeva (2023) (19), covering 267 Scopus-indexed documents on Balanced Scorecard implementation in education, situates the case-based findings above within a wider publication landscape. Authorship was concentrated in the United States, Indonesia, and the United Kingdom, with comparatively limited representation from the developing-country contexts examined in several of the included primary studies, such as Sierra Leone and Ethiopia (23). This geographic imbalance in the underlying literature offers a plausible explanation for the contextual gap identified in the Introduction: because most conceptual and empirical development of frameworks such as the Balanced Scorecard has occurred in well-resourced, developed-country institutions, the versions of these tools reaching low-resource educational systems may be poorly calibrated to conditions of severe budget constraint, weak monitoring infrastructure, and low baseline stakeholder participation—precisely the barriers reported in Sierra Leone (Kamara et al., 2024) and in the Ethiopian secondary-school context discussed above (Gebisa, 2022) (24). This may explain why studies conducted in developing-country settings more frequently foreground implementation failure and resource constraints as central findings, whereas studies from higher-income contexts, such as Hughes and Davis (2025) in the United Kingdom and Di Tullio and Rea (2025) in Italy, more often report partial success accompanied by nuanced institutionalization challenges rather than outright non-implementation.

4.5 Integration with Institutional Theory

Considered collectively, the findings of this review are best interpreted through the dual lens of transformational-leadership theory and new institutional theory introduced earlier. Studies documenting participatory, well-resourced strategic processes (Aboudahr & Bin Mohamad, 2021; Chantarasombat et al., 2024; Hughes & Davis, 2025; Kamara et al., 2024) consistently reported favorable performance, quality-management, or innovation outcomes, and in each case the authors attributed this benefit to genuine two-way engagement between leadership and staff rather than to the formal strategic tool in isolation. By contrast, studies examining the fidelity of implementation rather than the presence of a plan (Di Tullio & Rea, 2025; Egorov & Platonova, 2023) found that formal adoption of strategic language was common but substantive change was not, a pattern consistent with mimetic and coercive isomorphism and with the decoupling mechanism described by Meyer and Rowan (1977) and DiMaggio and Powell (2020) (29). Taken together, this suggests that the central determinant of whether strategic planning in educational organizations produces genuine innovation or merely symbolic compliance is not the choice of framework—Balanced Scorecard, Hoshin

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Planning, SWOT/PESTEL, or a bespoke leadership module all appeared in successful cases—but the extent to which formulation, resourcing, and monitoring are participatory and sufficiently funded to survive translation from written document to daily practice.

Conclusion

This rapid systematic review successfully maps the shifting paradigm of strategic management in educational organizations from 2007 to 2026, demonstrating that while formal strategic planning tools are vital instruments for operational quality, their ultimate efficacy hinges entirely on the mode of execution rather than the framework selected. By systematically analyzing diverse institutional settings ranging from primary schools to comprehensive universities, this study has achieved its core objective of identifying the structural catalysts and institutional barriers that dictate whether a strategic plan translates into actual performance or devolves into a superficial administrative exercise. What this review distinctively adds to the existing body of organizational literature is a nuanced integration of new institutional theory with transformational and participatory leadership models within educational settings. Moving beyond traditional descriptions of corporate-to-academic tool transplantation, this study uncovers the exact mechanisms of "decoupling"—whereby institutions ceremonially adopt modern strategic language or mimic elite universities strictly to secure socio-political legitimacy and funding, while leaving day-to-day classroom and faculty practices entirely untouched. By synthesizing successful counter-cases, such as the deployment of bidirectional dialogue ("catchball" mechanisms) and community-anchored models, this work provides a framework showing that decoupling can be actively mitigated when leadership moves away from rigid, top-down mandates toward shared ownership.

The practical implications of these findings are highly significant for educational leaders, policymakers, and institutional administrators navigating the volatile environment of modern education. The synthesis proves that importing commercial frameworks like the Balanced Scorecard can yield genuine academic innovation, provided metrics are deeply recalibrated to protect the pedagogical mission and professional identities of educators. Rather than viewing strategic documentation as a static bureaucratic compliance requirement, institutional boards must treat strategy as an iterative, living dialogue that actively aligns overarching administrative goals with the motivational needs and cultural realities of frontline academic staff. To advance this field of inquiry, future research should prioritize large-scale, longitudinal, and mixed-methods research designs capable of quantitatively tracking the direct impact of strategic implementation on concrete student outcomes and instructional quality over multi-year periods. Additionally, more empirical attention must be dedicated to developing and validating localized, resource-sensitive strategic management modules tailored specifically to the unique constraints of educational organizations in developing countries, ensuring that the future of educational governance is rooted in sustainable, participatory innovation rather than symbolic institutional compliance.

Limitations

While this rapid systematic review provides valuable insights into the implementation and outcomes of strategic planning frameworks within educational sectors, several methodological and conceptual limitations must be acknowledged:

Linguistic and Database Boundaries: This review was strictly restricted to peer-reviewed literature published in English and Persian languages between 2007 and 2026. Consequently, relevant empirical studies published in other languages or indexed exclusively in regional databases outside the search scope may have been omitted, potentially limiting the global generalizability of the synthesized findings.

Methodological Imbalance and Over-reliance on Qualitative Data: A significant proportion of the included literature relied heavily on qualitative, single-site case studies or descriptive self-reported surveys. The noticeable scarcity of longitudinal research designs and rigorous research-and-development (R&D) efficiency formulas makes it difficult to establish robust causal relationships between specific strategic frameworks and long-term academic or instructional performance metrics.

Database-Specific Search Anomalies: As documented transparently in the methodology, the initial search string in certain databases (such as MEDLINE/PubMed) yielded a disproportionately large number of baseline records due to the breadth of universal outcome terms. Although rigorous multi-stage screening based on strict PICO criteria was applied to filter out irrelevant records, this

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operational variance highlights the difficulty of isolating purely educational administrative constructs within broader interdisciplinary databases.

Contextual Heterogeneity: The structural, financial, and socio-political climates of the educational organizations examined varied substantially across developed and developing nations. Merging data from highly autonomous Western higher education institutions with tightly centralized, resource-constrained primary schools in developing regions creates a high degree of contextual heterogeneity, which restricts the formulation of a single, universal strategic roadmap.

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