

## Introduction and Scope

Leading a primary school in an inner London, socially deprived, high-density multicultural area presents unique challenges and opportunities. The key strategic documents that Beam rely upon are the three-year Governors' School Improvement Plan (SIP Appendix A), the 23/24 School Operating Plan (SOP) Appendix B, and Beam's Evaluation Form (SEF). These key documents are written collaboratively as a Senior Leadership Team (SLT).

The purpose of this document is for Governors to review the school's strategic direction. *Please also see summary sheet attached – Revisit of our Governors Long Term Plan.*

Coupled with education, global and local external factors, UK schools are Ofsted inspected, and as part of their framework, the quality of education is a crucial judgement. Often, their judgement and attainment results influence parental choice for a school.

Underpinning the SDP, curriculum issues are a vital component of educational institutions, and as Counsell, 2018 notes in her blog, senior leadership is essential for the curriculum. Accordingly, a strategy for curriculum and Beam 's context is a prerequisite, particularly given the nature of Ofsted – we are in the Ofsted 'window'.

Beam uses Turner's, 2016 (The Headteacher, 2022) definition of curriculum (Figure 1):

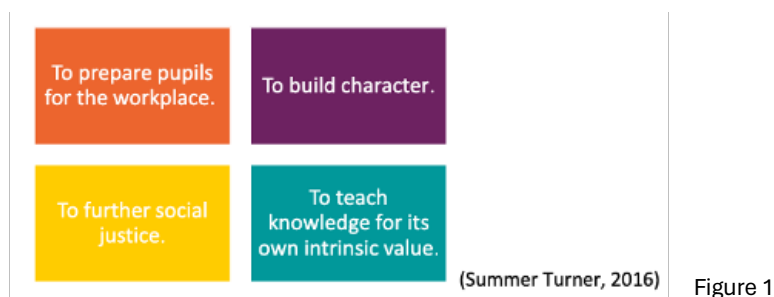


Figure 1

Given Beam's socio-economic context, ensuring that social justice permeates the curriculum requires a nuanced approach considering the complex interplay of internal and external factors. Beam 's drive to improve the quality of education has continued

following its last inspection in 2019. However, the landscape of Beam has changed. Before COVID-19, Beam 's attainment and progress for KS1 and KS2 were above or significantly above the national average (see Appendix D). Beam has been impacted by the pandemic, despite recovery plans. The National Literacy Association notes,

*'Figures on the pre-pandemic gap in attainment between children from lower and higher-income households are concerning. Despite commendable and hard-won progress to close the gap over the last decade, the gap doubles between entry and exit from primary school (from 4.6 months to 9 months) and does so again (from 9 to 18 months) between finishing primary and finishing secondary school. In recent years, progress in closing the gap has shown signs of stalling, with researchers identifying an increasing proportion of children in persistent poverty as a contributory factor.'* (To read the full article: [press here](#)).

Furthermore, our attainment data has been significantly impacted by the high number of pupils with SEND. Children can be 'disapplied' from the tests if they cannot access the curriculum or are unable to do the tests, ***although they are recorded as disapplied, the 'headline figure' still includes them - and that's the one that's published.***

Currently, our Year 2 cohort (End of KS1) SEND figure is 25% of the cohort

Currently, our Year 6 cohort (End of KS1) SEND figure is 10% of the cohort – 8 pupils with have an E code.

### Education as a Business

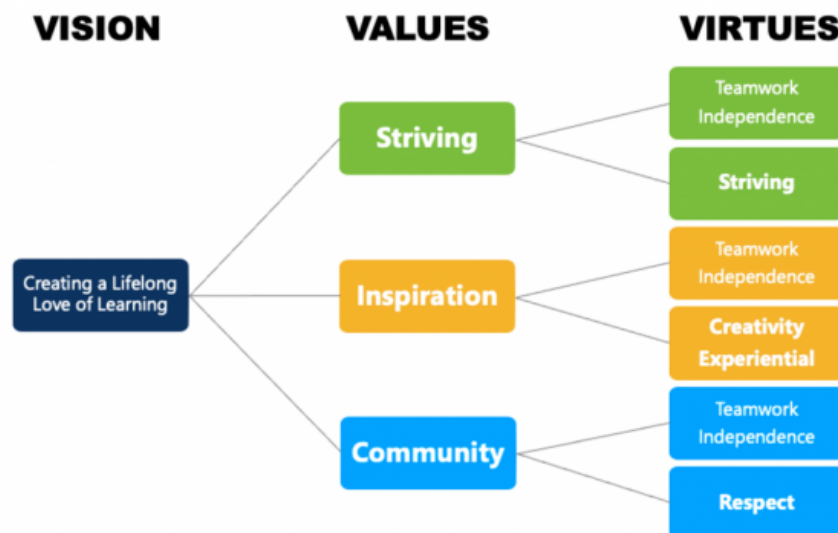
There we have always had a strategic educational plan, but no consideration of strategic business planning. This shift to business planning is commented upon by Nutt, 2016,

*'...Being involved in the business of education is not the same as working for an education business. Most teachers prefer and choose the former. Even those who work in the private sector have a completely different mindset and attitude towards education than employees in an outright education business...'*

Accordingly, schools face the challenge of providing quality education and ensuring sustainable growth. This report aims to revisit Beam 's current strategic documents and

construct a comprehensive strategy for the primary school by considering the theoretical strategic constructs. Through these lenses, the exploration of actionable steps towards educational excellence, creating a lifelong love of learning and sustainable growth will be considered and analysed.

The governors and staff constructed the vision and values of this school (Figure 2).



(Figure 2: School's vision, value and virtues)

Whilst exploring the current strategic objectives and effectiveness, this report will further aim through Hoshin Karnri's, strategic planning system (Captiva, 2023) to update processes and implement the different layers of leadership and accountability to meet the strategic aims, demonstrating how seamlessly the models could work from macro to micro and how the macro environmental dynamics of the models could work from one to another.

The report's objectives are:

1. To review Beam 's current strategic documentation by exploring theoretical constructs and their application to provide insights to improve the strategic planning process.

2. To explore how communication could be improved at all levels within Beam, by applying strategic models and to begin to understand how perspectives at that level can shape the action.

## Macro Environmental Dynamics

The broader view of a PESTLE analysis provides the horizon of the national and local view, thus allowing Beam to be proactive and forward-facing. For Beam, the concepts of political and economic overlap and individuals, Dane, 2023 comments on Kahnemann, D's thoughts on how it can influence the perception of what is on the horizon, hence why the SLT with diverse views needs to view perspectives of the horizon from different angles and perspectives.

Appendix E is the PESTLE document that the SLT created. It is clear from reviewing Beam's strategic documents that internal political factors have been considered, but not those external to Beam. Moreover, the 2022 – 2025 SDP focuses on education, not sustainable growth.

This is a key concern, as 'companies that fail to implement sustainable growth into their business models will experience higher consequences and costs later.' La Face, S, 2023 *Maersk*. Additionally, Forbes, 2021 suggests that 'businesses should ensure sustainable growth by focusing on customer service, staffing and creating new business models'.

This report will take one factor from the PESTLE analysis (Appendix E) and further explore an aspect of it.

**Politics:** From assessing the SDP and the (SOP), Beam needs to be equipped to develop effective strategies for a Labour government by considering the political landscape. Upon reviewing Labour's education 'mission' (Whittaker, F, 2023, *Schools Week*), it is clear that Beam should continue with their endeavours regarding social justice and oracy. However, due to the digital commitment of Labour, Beam should consider moving computing to the Education Endowment Foundation (EEF) preparation phase (Appendix B).

This will impact Beam 's digital infrastructure, training and curriculum, which has yet to be costed or considered.

The strength of this PESTLE analysis is that factors overlap; this helps Beam gain a meaningful understanding of its business environment and link this strategy.

**Economics:** The Mayor of London has increased free school meals so that London primary school students are eligible for universal free school meals (UFSM). The impact on Beam is that:

1. Some parents are not applying for Free School Meals (FSM) as their child receives a meal, meaning Beam does not receive additional funding. nevertheless,
2. The uptake for school meals has remained between 82 – 84% despite the offer of UFSM. Beam provides their in-house provision.

With a likely probability that Labour will win the election, as of June 2023, it appears that Labour will stop the UFSM programme (Belger, 2023). Furthermore, as part of their pledge, they seek to introduce fully-funded free breakfast clubs in every primary school.

Due to two staff members leaving, Beam seeks to recruit a catering staff member. Beam will need to consider:

1. Contractual arrangements for the new catering staff member to ensure measures such as working hours and roles.
2. A comparative analysis of pupil numbers before UFSM and currently to identify the working hours for the recruit.
  - i. To ascertain any patterns or trends regarding Beam's menu.
2. Consult the SBM and Catering Manager to review and build on their current practice, identifying additional equipment, capacity, and resourcing.
3. Conduct a BCG matrix with the children, middays, staff and catering staff to analyse the menus.
4. To survey the pupils, and separately the pupils of those pupils, to identify why they do not accept the offer of UFSM. With this information, plot a SWOT analysis as it would identify areas of improvement and development, allowing Beam to develop a strategic approach taking into account its stakeholders. Through their

involvement, we will obtain different perspectives and insights to make strategies more effective.

To deepen this information, Beam will need to prioritise the information. Whilst also considering, “are their 'quick fixes?’”

**Social:** One of the London School of Economics (LSE, 2023) key findings is that 'Children with SEND living in more affluent areas have higher chances than those in poorer areas of being diagnosed with less prevalent, more precisely defined conditions, that involve agencies and resources outside of the school in diagnosis'.

In alignment with Labour's manifesto:

- teachers and support staff will require SEND training.
- Identification of pupil and staff needs, updating the CPD schedule

Utilising the Local Authority's SEND local report (Appendix F), the percentage of Education Health Care plans (EHCPs) across the board, Barking and Dagenham's figures are generally lower than in other London boroughs. However, those children requiring support are higher. Delving into this would provide insights into possible reasons why. It has been suggested the reason is because Barking and Dagenham require schools to produce more paperwork than other local authorities.

A comparison of Beam's data with the 'Primary need in primary schools' (2022/23) by the SENDCos could have provided valuable insights into Beam 's uniqueness. However, the LA data is old and unreliable in providing a clear view of the external and internal factors that could impact Beam.

**Technology:** The Business Unit Evaluation further explores this finding.

**Legal** – Further links with social and economic links are made. As the SEND parents from this school are not empowered to know their legal rights, the PESTLE shows that Beam bears the burden of this – both financially and emotionally. Parents also vent their frustrations at Beam, believing they are the barrier.

To ameliorate some of the legal issues, Beam should consider:

1. SEND leads developing their legal awareness through CPD
2. Devise a plan on how parents know their legal rights.

To ensure that parents who need support are targeted, a BCG matrix may prove helpful by adapting the model because it will assist Beam in identifying which parents have the most growth potential. It is important to note that 'income' is replaced by SEND legal knowledge.

**Environmental:** By zooming in on geography, the team at this school have thus far ascertained:

- **Economic:** Increased costs to school, e.g. school trips and enrichment opportunities;
  - Social: Social and Racial Justice- Adaptations to the curriculum, obtaining the Equality Award.
- **Technology** - Opportunities for Beam pupils to have different experiences – raise expectations and give pupils an insight into the different careers that they may enter.
- **Environmental** – For trips, the cost of coaches may increase as newer vehicles may be required; Maintenance of outdoor area- cost across Beam; Weathering of resources; Beam ECO team- less pollution/ cleaner air – healthier pupils and higher attendance. Implementation of Beam Eco Team.

The Hoshin Kanri model could provide an objective setting plan (see Objective Setting).

The interplays between the different factors can provide a cohesive overview of Beam's context. Zooming in on Political and Economic factors will impact strategic decision-making, encompassing school policies and cost-cutting measures. The interplay between Political and Economic factors will impact strategic decision-making, encompassing school policies, coupled with cost-cutting measures, factoring the recession, poverty for families, lifestyle and crime. Accordingly, social justice as a curriculum strand is required to address the specific needs of disadvantaged



communities. Moreover, funding allocations and teacher regulations have shaped the horizon, particularly concerning the Special Educational Needs and Disabilities (SEND) provision. With parents who lack legal awareness or with SEND themselves, this is increasingly putting pressure on Beam. A strategic direction can be set by proactively advocating for resources and reforms.

By factoring in the recession, poverty for families, lifestyle and crime, social justice becomes a key curriculum strand to address the specific needs of disadvantaged communities, providing a wider basis and justification.

## Industry Analysis

From the PESTLE analysis (Appendix E), the threat of the competitive nature of the new estates and school buildings is interrogated further by applying Porter's Five Forces to deepen Beam s' understanding of marketing competition. In doing so, Beam can begin to think about how to shape the forces to be in their favour so that they can increase pupil numbers. The model has been adapted to consider:

- The higher Beam s in the area (competitive forces) in an industry, the lower the pupil numbers (industry's profit) as a whole
- The lower Beam s in the area (competitive forces) in an industry, the higher the pupil numbers (industry's profit) as a whole

Appendix G demonstrates that awareness of the strengths and weaknesses for Beam facilitates it in being able to drill down to extrapolate the information required for strategic and operational direction. Porters Five-forces facilitates the interplay between competition and broader perspectives provides strategic agility, helping Beam identify its unique selling point and risk mitigation. Accordingly, the benefit is that this model provides a starting point so that it can consider how to shape the forces in its favour.

Seven schools are within 1.5km of Beam. The three new schools opening their doors over the coming months are:

1. **Pathways School** – 90 - 100 pupils - cater for students with Social, Emotional and Mental Health (SEMH) special needs (Year 3 – 13). 1km away  
Open already – before Christmas

### USP

- Spread over two storeys, the school features modern, stimulating and multi-purpose spaces to meet students' different learning needs and enhance wellbeing.
- It comprises a range of Primary, Secondary and Sixth Form classrooms, therapy and sensory rooms, dining and vocational food areas, library, outdoor learning facilities, sports hall, flexible spaces that can adapt over time, and parking and cycle spaces.

(<https://www.reds10.com/2022/07/14/plans-for-pathways-school-in-dagenham-get-go-ahead/>)

2. **Fords View Primary School** – Brand new 3-form primary school, due to open in 2023. Same MAT as Thames View: <http://fordsviewprimary.org/>  
2026/6 – 2026 – phased 1 reception class

USP

- award-winning, multicultural Academy Trust.
- success with Thames View Infants:
  - attainment within the top 3% of all schools nationally at Expected
  - within the top 1% at Greater Depth.
  - For some years now, it has been ranked as the highest-achieving Infant School within Barking and Dagenham, also out-performing most Schools across London.
  - Thames View Infants was judged as ‘*outstanding*’ by Ofsted in March 2009 and again in April 2014.

3. **The Emmanuel School Trust** – due to open September 2024 and will have 420 spaces for pupils between four and 11. A 30-place nursery and specialist additional provision for 12 pupils with an Education Health Care Plan, are also included in the plans.

USP

- The school in Beam Park, it said, will be a hub for the community with the curriculum including environmental projects.
- faith-based multi-academy trust - Being a non-selective school that reflects the ethnic diversity of the local community, the trust said it will welcome pupils of all faiths and no faith.
- It runs the Emmanuel Community School in Walthamstow that was rated 'outstanding' by Ofsted in 2017.

<https://www.barkinganddagenhampost.co.uk/news/23927801.plans-drawn-new-primary-school-beam-park-rainham/>

As Porter's 5 Forces is generic, a SWOT analysis was conducted to further interrogate the aspect of recruitment (see Appendix H), as this assisted Beam in pre-empting the direct impact.

Due to the future-orientated power of a PESTLE analysis, it also identified that SEND specialist staff may become an issue. Recruitment and retention of high-quality staff have been challenging for the education sector for several years, and all schools

compete for staff. A further Porter's 5 Forces model considering recruitment could be used to assist with more explicit identification and a possible strategy, as Beam will need to ensure that it differentiates itself from its competitors. However, the issue is that this model only allows them to see its situation at a current given point. Nevertheless, companies integrating these broader perspectives into their strategic planning are better equipped to navigate and thrive in dynamic and competitive environments.

## Internal Organisational Analysis

Through the subject SWOT analysis from 2022 – 2023 (Appendix I), middle and senior leaders assessed the effectiveness of geography. At an SLT level this analysis proved useful, as it identified a threat to the SLT:

1. Lack of consistency was considered as a strength. The opportunity was for CPD training and for internal moderation. By applying Hoshin Kanri's strategy deployment, Beam's goals should cohesively align with its priorities
2. Opportunities and threats of value, at this level had not been communicated to the SLT. To provide better decision-making, application of the Hoshin Kanri planning would provide a structured approach to problem-solving and decision-making since this model facilitates communication between the different levels of Beam hierarchy.

At a SLT level, the SWOT analysis (Appendix J) was used to identify and evaluate the internal and external factors that could impact Beam's performance at a meso level. The advantage was that it facilitated a rich dialogue which informed decisions about Beam's future direction. The threats and opportunities could have been more efficiently scrutinised using the PESTLE analysis, which would have provided a comprehensive structure of external forces. It is through the structured approach of considering how external factors could influence Beam to guide the leadership team in strategic decision-making (CIPD, no date)

**Strength:** The diverse local community highly values Beam due to its educational outcomes and sporting opportunities. In a densely populated area, Beam has a large playing field. Staff are highly trained, and Beam provides opportunities for growth to both pupils and staff.

**Weakness:** Due to the large nature of Beam, communication needs to be improved. Social justice within the curriculum and extra-curricular clubs has not been monitored.

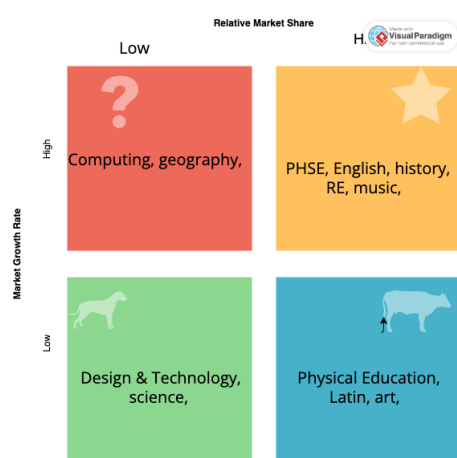
**Opportunity:** Improvements to internal communications and deployment of staff would alter these weaknesses and ensure that Beam was operating more efficiently. This should be planned strategically.

**Threat:** 'New schools being built nearby', is considered in this report using the Industry Analysis.

The continuous nature of the SWOT analysis and involvement of the stakeholders ensures that additional factors are considered so that Beam can adapt to its emerging needs.

## Business Unit Evaluation

As an education improvement priority, implementing social justice into the ethos and curriculum of Beam is a long-term improvement priority. When applying Locke and Latham's goal-setting theory, 1968), Beam's targets are SMART (Specific, Measurable, Achievable, Realistic, Time-bound), and staff receive feedback. However, upon reviewing the performance and strategic positioning of the implementation of social justice, it is too broad and lacks prioritisation.



Applying the BCG (Boston Consulting Group, 1970) matrix to social justice in a primary school is contextually different to its original application, as it involves using different criteria and values for a business. Nevertheless, this growth-share matrix helps to prioritise services and allocate resources accordingly. Application of this model to the curriculum provides a helpful tool for decision-

making and strategic planning.

Through discussions with teaching staff, the team collaboratively co-constructed that **Social Justice for Beam is providing opportunities and developing awareness through education as a route to social change and mobility.** To prevent confirmation bias (Harvard Business Review, 1998), working in cross-phase year groups, teachers discussed the impact of outcomes through the curriculum subjects and the impact regarding social justice. In cross-phase groups, they plotted each subject, evidencing how the subject brought about social change and mobility.

**Question Marks:** Computing (EEF - explore) and geography (EEF - prepare) are currently in the development stages (see Operational Plan - Appendix B). The BCG analysis shows that these subjects will require a lot of investment and evaluation to embed social justice strategies and considerations. With Political awareness, it may be prudent to escalate computing due to Labour's manifesto.

**Stars:** Subjects with high value to interweave social justice through the curriculum

**Cash Cows:** Subjects with a high market share in a rapidly growing subject have the potential to move to stars quickly.

**Dogs:** Subjects with a low market share and declining. These are subjects that the teams need to prioritise and support with a clear strategy.

Using this tool alongside SWOT analysis, teacher and pupil questionnaires, lesson observations and book scrutinies will provide a comprehensive exploration of that subject and lines of enquiry for analysis, which the subject lead will lead on. A 'feedback' loop (Carton, 2023) must be implemented for effective communication.



## Objective Setting

Appraisal targets are set by the headteacher, which are based on the operational plan and disseminated to the SLT (see Appendix K). While the actions for the target are discussed, unlike Hoshin's model, the strategy and how the targets link to the strategy are not discussed; therefore, there is not always consistency or clarity.

When applying Hoshin's strategic planning method, it is evident that Beam needs to align the objectives consistently, and in some cases, the strategic external factors (national in particular) have not been considered. Thus, there is only sometimes a clear alignment with the objective. Carton, 2024 comments on the importance of 'knowing where you are going, mapping out how to get there, as it eliminates inefficiencies.

Communication is central to this model, as the headteacher has worked at Beam for a long time and has built good relationships with the staff. The uniqueness of the Catchball would also necessitate some explanation so that the purpose is understood. The Catchball process is at the heart of Kanri's model; it is the crux for aligning and implementing strategies. This process denotes the top-down and bottom-up processes as plans and objectives are shared with every staff member at all levels. This process would assist the headteacher in understanding the strengths and issues of all layers within Beam. (Nicholas, 2014).

As the Hoshin's planning is similar to their current process, there will be a buy-in. This model depends upon relationships, context, clarity and connection to succeed. Accordingly, the recommendations will comment on adaptations that will be considered.

Zairi & Alan ,2014, noted strategic planning problems - how do you communicate at the different levels? Accordingly, consideration for the appraisal process would be to introduce alignment at all stages and during the planning stage to identify the appropriate mechanisms, discuss training to meet the strategy, identification what success would look like.

During the monthly review of the strategic aims, consideration would need to be given to changes to the goal, as this may entail numerous modifications in direction.

## Recommendations and Conclusions

Sinek, 2023, in his Leadership Ted Talk, discusses getting the environment and tone right so that 'remarkable things happen'. Strategic planning provides certainty and assurances; with the models used, it provides insightful strategic planning, but the process also fosters a culture of inclusivity and promotes collaboration, ensuring that stakeholders and all levels of staff are heard and involved in the strategy process. This report shows that communication underpins the driver factors, and Beam should seek to improve this.

Based on the findings of this report, the opportunities and threats (of the SWOT analysis) were further defined by a PESTLE analysis, as it provided a comprehensive structure (due to the seven factors) for forward thinking and planning. Furthermore, the process developed awareness for the SLT and a shared understanding of how the factors impacted Beam 's various education inspection framework aspects.

Nevertheless, it is important to note that whilst the SLT has prioritised the review and implementation of social justice, there needs to be a 'feedback loop' (Carton, 2023), as previously noted, due to the unique nature of a school, Quality of Education is prioritised. Accordingly, processes must be implemented to improve communication between the middle and senior leaders. Applying Hoshin Kanri's tool should facilitate communication between different levels of the hierarchy.

Due to the autonomy of the different sectors of the Hoshin Karin model, it has become apparent that the leadership structure needs reviewing. The Hoshin model (application (Appendix L) would assist the headteacher in understanding the layers in Beam, a more explicit plan to delegate the areas of responsibility should assist with efficiencies and cohesiveness.

Recommendation:

1. Using the PESTLE analysis, Governors to review and update the **Governors Improvement Plan** by reflecting the external factors and stakeholders' views.

2. SBM to provide a three-year business plan modelling the timeline of the new buildings, schools, and pupil places, so that a comprehensive strategy can be formalised.

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