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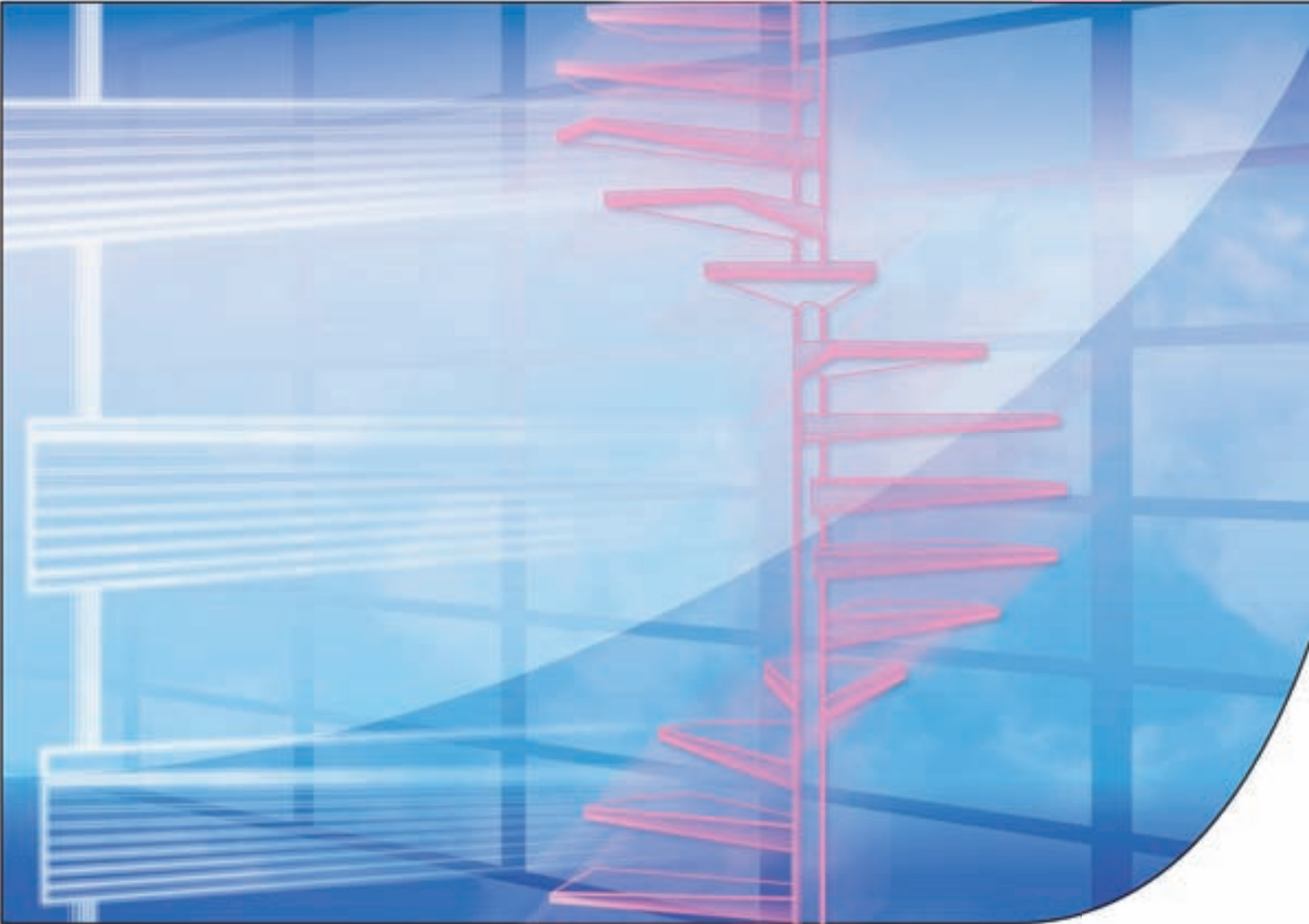


International Institute
for Educational Planning

Strategic Planning

Organizational arrangements

Working
paper



Strategic planning: Organizational arrangements

Strategic planning

Organizational arrangements

Education Sector Planning Working Papers

WORKING PAPER 2



United Nations
Educational, Scientific and
Cultural Organization



International Institute
for Educational Planning

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Foreword to the series

The priority mandate of the International Institute for Educational Planning (IIEP) is to strengthen the capacity of UNESCO Member States to plan and manage education effectively. IIEP aims at fulfilling this mandate through a range of interlinked programmes: short- and long-term training, in Paris, in Buenos Aires and in the field; research on challenges to effective educational planning and management and on successful strategies and practices; policy guidance and advocacy; and collaboration with countries on the actual preparation of plans, and on their implementation, monitoring and evaluation.

Over the years, IIEP has supported a large number of countries in developing their capacity to formulate their national education sector plans. This Education Sector Planning Working Papers series draws from a vast accumulation of 'field-based' experience of IIEP staff members and consultants working with a diverse range of countries. The intention is to have a set of practical and easy-to-use guidelines on different aspects of the strategic planning of education that could be applicable in various contexts. These working papers have been prepared primarily for senior policy/decision-makers, for staff of Ministries of Education and national and regional institutions involved in technical aspects of planning and for international agency staff supporting national policy and planning. To facilitate their work in education sector planning, we have made them available on the IIEP website.

Through these Working Papers, IIEP hopes to contribute to the important work being done by the community of educational planners and managers in many countries, sometimes in very challenging conditions. Other self-learning materials on specific educational planning and management issues are also available on IIEP's website (www.iiep.unesco.org). The website contains, in addition, a portal of education plans and policies from UNESCO Member States, called Planipolis (http://planipolis.iiep.unesco.org/basic_search.php).

Finally, we intend the Education Sector Planning Working Papers to evolve over time as we learn from joint experiences. Thus, any feedback to the documents will be most appreciated. The team who prepared the documents would like to acknowledge the support of the Ministries of Education of various countries and the development partners, which has greatly contributed to this work.

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Introduction

This working paper is intended to assist in the preparation of a strategic medium-term sector plan. There are two basic assumptions behind the guidelines.

First, it is assumed we are in a situation in which such a plan is being prepared for the first time. In cases where a new plan succeeds an already existing one, the conditions will be different. The diagnosis will be simpler, because it will largely coincide with the final evaluation of the current plan. The overall long-term policy might largely remain the same and even the programme structure might not be fundamentally altered. Also, some basic tools, such as a nationally adapted simulation model, will already be in place. In other words, the various steps to be taken will not be different but certainly a lot easier.

Second, it is equally assumed that the plan will not be prepared in a technocratic way by external national or international experts, but by the Ministry staff itself, with the active participation of the different national and international partners and stakeholders.

Before the real planning work can start, there is a need for the Ministry to organize the plan preparation process itself, which means to put in place the necessary structures, distribute the different responsibilities and tasks, mobilize the required resources (particularly the human ones), and fix a clear time schedule. This preparatory phase is the precise topic of this document.

There is no single way of organizing a strategic plan preparation. Every country has its own specificities. Ministries of Education have different experiences, different organizational structures and different management cultures. In addition, things rarely start from scratch and previous arrangements have to be taken into account.

Organizational proposals for preparing a medium-term plan are very much context specific and thus not transferable to other countries. Nevertheless, they can give a good idea of the basic questions to be addressed in all cases, as shown in *Box 1*. Each of these questions will be briefly commented upon in what follows and indications given of possible ways of answering them.

Box 1. Basic questions to be addressed

1. How to mobilize the technical expertise required for the plan preparation
2. How to involve the whole Ministry in the planning process
3. How to ensure the participation of partners and stakeholders
4. How to organize coordination and monitoring of different activities
5. How to fix an appropriate work plan for the different activities to be carried out

The first four questions will be addressed under *Section 1* on Organizational arrangements, while *Section 2*, Preparing a work schedule, will be dedicated to the fifth question.

1. Organizational arrangements

1.1 Mobilizing technical expertise

Any planning, whether participatory or not, is in the first instance a technical undertaking and therefore needs a strong national expert team. This Strategic Planning Team should be the technical driving force behind the plan preparation.

The team will not only be in charge of carrying out the different technical tasks (data analysis and reporting, making forecasts and simulations, designing programmes, cost calculations, etc.), but also of feeding the planning process with the relevant information and providing the different actors who will be involved, and in particular the Technical Working Groups (see below), with the technical guidance and support needed, and finally of monitoring the reporting process and writing up the plan document.

In addition to some basic generic skills (analytical capacity, communication skills, reporting and writing skills) the Strategic Planning Team should combine in one way or another specific technical competency in the following areas:

- statistical analysis (including the use of indicators);
- use of computerized simulation models;
- programme design and monitoring;
- costing, budgeting and financing.

The anchor point of the strategic planning team will normally be the Planning Department, which should be able to provide most of the competencies listed above. However in several instances there will be a need for additional expertise from outside the department. It is always preferable to select the additional expertise from within the Ministry (e.g. a specialist in costing and budgeting from the finance department), but in certain cases expertise will have to be brought in from outside on a temporary basis (e.g. from universities or research centres, or from other Ministries with experience in strategic planning) depending on the specific conditions of each country.

While setting up the team it is important to bear in mind that the planning process itself is a learning experience. At the beginning, many specific skills might not yet be fully developed. This should not be a problem, provided the elementary skills are there, the team members are motivated and, of course, given that the whole process includes an explicit capacity development component. The planning team should indeed be the main target group of the capacity development activities that will be undertaken as an integral part of the strategic planning process in order to ensure its sustainability in the longer term. Such capacity development activities can best take the form of brief explicit training workshops, which are directly related to the specific planning tasks to be performed and are combined with on-the-job coaching by whatever external capacity building team may have been brought in to support the planning process.

1.2 Involving the whole Ministry

As mentioned in 'Education Sector Planning Working Paper 1', *Strategic Planning: Concept and rationale*, a strategic plan should not be prepared by an expert team in isolation, but with the full participation of the different Ministry departments. Their active involvement in the plan preparation should allow the whole planning process to fully benefit from the experience and knowledge accumulated in the different departments and should thereby help in making the plan as realistic as possible. It further offers the most efficient (if not the only) way of creating sufficient ownership of the plan by those who will have to implement it later on, and of developing a feeling of accountability for obtaining the expected results.

The most common procedure for making the plan preparation a collective Ministry undertaking is to set up different Technical Working Groups in charge of specific areas or themes. During the phase of diagnosis, Working Groups can best be formed by level and type of education (early childhood education, basic education, upper secondary, technical and vocational, adult education, teacher training, etc.), complemented by a few cross-cutting groups (e.g. on management, cost and financing, etc.). A reshuffling of Working Groups might be required later on, at the stage of programme design, in order to adapt their number and composition to the list of priority programme areas that have been selected (some of which will still be level-specific, while others will be cross-cutting but maybe along different lines from those retained for the diagnosis).

Each Technical Working Group can best be composed of a small number of selected staff members from the department(s) directly concerned with the specific area under discussion, reinforced by a few knowledgeable outside specialists, by a few representatives of the decentralized levels of administration whenever possible, and by at least one member of the Strategic Planning Team (who should act as a facilitator).

In order to function well, the Working Group members should be properly briefed and trained (in the way indicated above). They should further be supported in their work by the Strategic Planning Team, which should provide them with the necessary information and technical guidance needed for carrying out their tasks.

The main functions of the Technical Working Groups, to be carried out with the direct support of the Strategic Planning Team, will be:

1. to carry out the situation analysis of the education sector, resulting in the identification of the main problems and the challenges ahead;
2. to make proposals concerning the objectives, targets and priority action programmes to be included in the five-year plan; and
3. to design the different priority programmes selected for reaching the plan objectives, including the identification of indicators for monitoring the programme implementation.

1.3 Ensuring the participation of stakeholders

Stakeholders in a given programme are any individuals, groups, or organizations that directly or indirectly, positively or negatively affect or are affected by the processes and/or the outcomes of the programme. The concept is very broad and covers a wide variety of social actors. This is particularly true in a large and complex system such as the education sector, which offers different types of services and has multiple levels of action. A first challenge is therefore often simply to draw up a list of actors to be involved. In many Ministries of Education, the data available about stakeholders are scarce and fragmented, which further complicates the task.

Nevertheless, in most cases a classification of the main stakeholders can be made by using the following broad categories:

- development partners¹ including aid agencies, international and (large) national NGOs;
- civil society organizations and representatives, including religious, socio-cultural and economic representatives;

1. 'Partners' are a special category of stakeholders: individuals, groups of people, or organizations that collaborate to achieve mutually agreed upon objectives.

- professional education associations, including teacher trade unions, parent/teacher associations, etc.;
- the private education sector;
- decentralized levels of the education administration;
- other Ministries affecting or affected by the education plan: the Ministries of Finance and of Planning, but also Ministries of Labour, of Social Affairs, of Health, etc.

This list is not exhaustive, and other categories, such as political representatives, student representatives, representatives of the research community, and others, might be added depending on the specific situation. Furthermore the relative importance of the different categories of stakeholders and the way in which they are organized varies from country to country. In some countries the private education sector is very big, whereas in other countries it is quite small. In some countries the same private sector might have an overarching national organization, while in others it might be very fragmented. And similar differences apply to the other categories such as civil society organizations and professional education associations.

Consequently each country will have to prepare its own specific stakeholder map and decide on who should be involved in the planning process, in what way and to what extent. Different categories of stakeholders can be involved through different mechanisms, including: more or less formal information meetings, written or electronic communication, videoconferencing, formal consultation meetings, workshops, national conferences, etc. Also the level of involvement expected from different categories of stakeholders may vary from simple information sharing, over real consultation, to consensus building and finally direct participation in decision-making.

In general, the donor agencies are among the most active partners in the strategic planning process. In line with the Paris Declaration on Aid Effectiveness,² many countries have set up special structures (e.g. in the form of a Joint Working Group) for ensuring regular policy dialogue between the Ministry of Education and development partners. And in certain cases the donor group is also represented in the high-level Steering Committee, in charge of guiding the strategic planning process and of making the relevant policy decisions (*Section 1.4*).

For obvious reasons the Ministry of Finance and the Ministry of Planning should also be key partners in preparing the strategic plan and should also be represented at the high-level Steering Committee. But their active interest and participation are often more difficult to obtain.

The decentralized levels of the educational administration are a special category. They are not simple stakeholders in the plan preparation, but important, if not the most important, plan implementers. And in a truly decentralized system they should even be the most important plan 'makers'. However for the time being, in most countries sector plans are (still) mostly a central level undertaking, with more or less active participation of the lower levels of management. The benefits of involving lower levels of administration are increasingly recognized, namely:

1. that their involvement can offer an excellent opportunity for building capacities at these levels, and thereby for paving the way towards a more decentralized planning system; and
2. that it stimulates ownership and thereby leads to better chances for a successful plan implementation.

But involving local level staff remains a complex undertaking that is time-consuming and requires substantial human and financial resources. The organization of a series of local level workshops at critical stages of the planning process (diagnosis, setting of objectives and priorities, and possibly also programme design) would probably be the most useful way of proceeding. But in most countries it is not realistic, for the simple reason that, at least when the first sector plan is being prepared, there is too little time and, more importantly, technical capacities at the central level for guiding and supporting the workshops are still lacking. In

2. For more details on the Paris Declaration, see: www.oecd.org/dataoecd/11/41/34428351.pdf

reality, and with some notable exceptions (e.g. Palestine), the participation of decentralized levels of management is often reduced to the organization of one or two workshops at the central level attended by a selected number of officers.

As for the other categories of stakeholders (civil society organizations, private sector, and professional education associations), different mechanisms are used for getting them informed and involved, including national consultation meetings and education conferences (attended by representatives of all categories of stakeholders) are the most common.

1.4 Ensuring proper coordination and monitoring

Coordination and monitoring of the planning process have to take place both at the technical and the policy level. There is again no standard formula for organizing these two complementary functions but only some general indications (a summary is given in *Figure 1*).

Chief Technical Coordinator

First of all, a strong Chief Technical Coordinator is needed, who will be in charge of planning, coordinating, and monitoring, on a daily basis, the activities carried out by the Strategic Planning Team, those undertaken by the different Technical Working Groups, and those organized for consulting and involving the different stakeholders. Under the best of circumstances (depending on local conditions such as structure of the Ministry, position of the planning department, hierarchical relationships, etc.), the Chief Technical Coordinator should be the Director of Planning as well as the coordinator of the Strategic Planning Team. In any case, whoever is put in charge of the overall daily coordination should be able to directly rely on the Strategic Planning Team, which, as mentioned above, constitutes the driving force behind the whole planning process.

Strategic Planning Committee

Still at the technical level, the Chief Technical Coordinator should be supported by a Strategic Planning Committee, which ideally should be composed of department directors, the coordinators of the different working groups (some of whom will also be department directors), and the Chief Technical Coordinator, who will act as secretary of the Committee. The Committee should be chaired by a high-ranking officer (e.g. the Permanent Secretary) with the necessary powers to make decisions as required during the planning process.

The Committee should meet regularly and as often as required, in order to assess progress made with the plan preparation and problems encountered, ensure information exchange and coordination between the different working groups, and deliberate collectively about the technical decisions to be made for keeping the planning process on track.

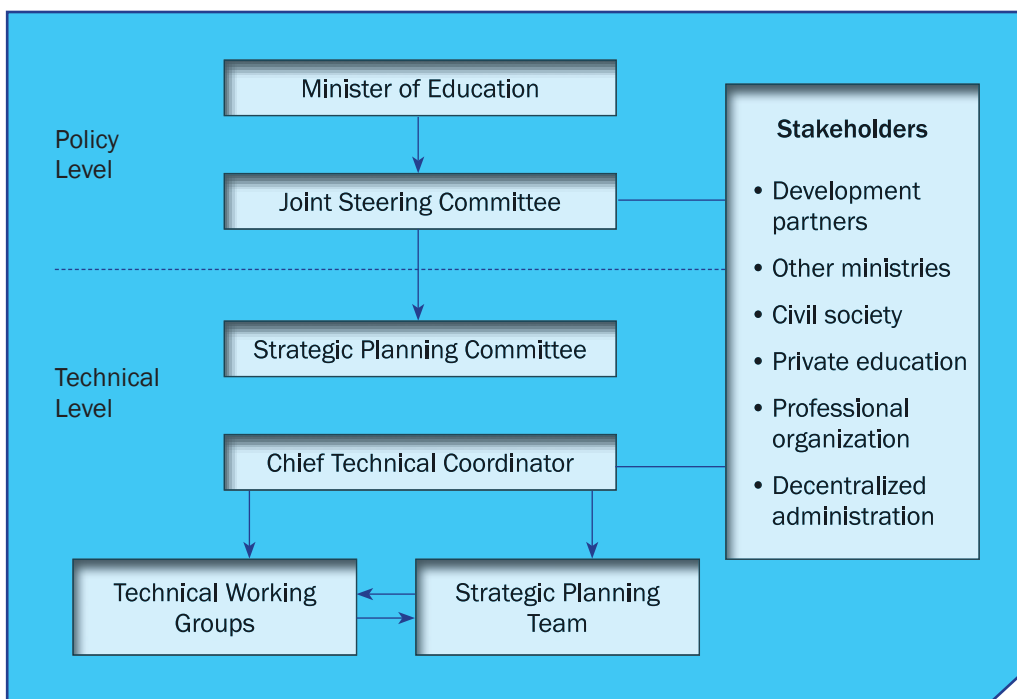
Joint Steering Committee

At the policy level, there is room for creating a high-level Joint Steering Committee, preferably chaired by the Minister or his representative and composed of top level Ministry of Education staff; representatives of the Ministry of Planning, Ministry of Finance and other selected Ministries; representatives of the development partners; and representatives of any other stakeholders, group that might be considered relevant.

The main functions of this Joint Steering Committee are:

- to provide overall guidance for the preparation of the sector plan on the basis of the inputs provided by the Strategic Planning Team and more specifically to advise the Minister on all policy decisions required for fixing the main plan orientations, goals and objectives, for selecting the priority programmes, and for the allocation of resources between the different plan components;
- to serve as a linking mechanism between the Ministry and the major partners in education development; and
- to appraise the plan document and make recommendations to the Minister for its approval.

Figure 1. Organizational arrangement for the plan preparation



2. Preparing a work schedule

Preparing a strategic sector plan for the first time, in a participatory way and with an integrated capacity building component, is a process that takes time (easily between 8 to 12 months) and which mobilizes considerable resources. The different activities involved therefore have to be properly planned and budgeted.

The plan preparation process can be split up into different phases, which, as stated above, are partially overlapping. Each phase implies the completion of different steps (activities), some of which can be implemented at the same time. Furthermore, the preparation of a plan is an iterative process – new information and insights will often require planners to go back to earlier steps and phases. Broadly speaking, the different phases are as follows.

2.1 Phase 1: Sector diagnosis

The diagnosis of the existing situation will start with an analysis by the Strategic Planning Team of the statistical information (including information about cost and financing) and of the various documents available (review reports, project documents, policy papers, etc.). The results of this analysis will serve as a basis for the discussions that will take place in the different Technical Working Groups. The sector diagnosis should conclude with the identification of the main challenges to be addressed during the coming years.

It is important that the decentralized levels of management be involved as actively as possible in carrying out this first phase.

2.2 Phase 2: Policy formulation

Policy formulation has to do with defining long-term goals, which might well extend beyond the medium-term plan, and with selecting major strategies to reach those goals.

Policy formulation is partly based on a review of existing policies and partly on the results of the situation analysis. The policy review – and even to a certain extent the policy formulation itself (at least in broad terms) – can already be carried out in parallel with Phase 1. The two phases are interwoven and should enrich each other.

The policy formulation is an iterative process that implies a close interaction between the planning experts and the policy-makers.

2.3 Phase 3: Selection of key plan objectives and priority areas

This phase is intimately linked to Phases 1 and 2. The identification of the main challenges resulting from the situation analysis, together with the broad policy orientations retained, will serve as the basis for setting the main plan objectives and targets and for selecting the priority programmes.

In order to make the final selection of objectives and targets realistic, a rough feasibility testing of different education development scenarios will have to be carried out during this phase. This means that the preparation of the simulation model, which will serve as the instrument for the feasibility testing, has to be initiated at the very beginning of Phase 1 in order to be ready for its use during Phase 3. The decentralized levels of management should again be actively involved in carrying out Phase 3.

The end of this phase is the appropriate moment to launch a broad consultation process of the different categories of stakeholders in order to share with them the results of Phases 1, 2, and 3 and invite their comments and suggestions about the main challenges ahead, the national policy goals and orientations selected, and the key plan objectives and priority areas identified.

2.4 Phase 4: Design of priority programmes

Once the plan objectives and priority action areas have been fixed, specific priority programmes will have to be designed for reaching the objectives, with indication of precise targets, of the key activities to be completed, of the corresponding time lines, and of the units responsible for each activity. This phase is generally the most time consuming.

The active involvement of the decentralized levels of management might be more difficult to organize, but it should be aimed for (e.g. through the active participation of selected local level officers in the different Working Groups in charge of the programme design).

2.5 Phase 5: Preparation of the cost and financing framework

Basic information about cost and financing should have already been collected at the beginning of Phase 1, and the first rough cost estimates for reaching the medium-term plan objectives will already have been made during Phase 3.

During Phase 5, specific costs of the different priority programmes must be estimated and the overall cost of the plan (recurrent and capital) calculated and balanced with the estimated funds that will be available. This will involve a final feasibility testing of the plan objectives. The balancing becomes easier when a medium-term expenditure framework (MTEF)³ is available, as is the case in an increasing number of countries.

The cost and financing framework should be prepared in close cooperation with the Ministry of Finance and the Ministry of Planning.

2.6 Phase 6: Design of the monitoring and review system

Once the preparation of the priority programmes is already well advanced (Phase 4), the monitoring framework can be designed. This framework will present a matrix of key indicators, and spell out the monitoring structures to be put in place at different levels of management, as well as the monitoring processes to be followed (including the review processes with the donors).

2.7 Phase 7: Writing up of the draft plan

The different sections of the draft plan will have been produced during each of the previous phases. During this phase, the different sections will have to be brought together in one coherent document.

At the end of this phase the draft plan should be shared with the stakeholders, and in particular with the donor agencies, the Ministries of Finance and of Planning and the decentralized levels of management, in order to collect their comments and suggestions for revision and finalization.

3. For more information on MTEF, see:
<http://web.worldbank.org/WBSITE/EXTERNAL/TOPICS/EXTPUBLICSECTORANDGOVERNANCE/EXTPUBLICFINANCE/0,,contentMDK:20235448~pagePK:148956~piPK:216618~theSitePK:1339564,00.html>

2.8 Phase 8: Revision of the draft plan and official approval of final plan document

The revision of the draft plan should take into account the comments and suggestions collected from the different stakeholders. The revised plan document will then be transmitted to the Steering Committee for its appraisal and recommendation to the Minister for its official approval.

Once the plan has been officially approved, a launching event can be organized in order to inform the public at large about the plan and to mobilize the different stakeholders for its successful implementation.

Table 1 summarizes the different phases of the plan preparation to be kept in mind when working out a time schedule.

Table 1. Plan preparation phases: technical responsibilities and stakeholders' involvement

Plan preparation phases	Technical responsibility		Involvement of stakeholders			
	Working groups	Planning team	Development partners	Ministries of finance & planning	Decentralized administration	Other stakeholders
1. Sector diagnosis	✓	✓			Workshop	
2. Policy formulation		✓				
3. Selection of objectives and priority areas	✓	✓	Consultation 1-2-3	Consultation 1-2-3	Workshop	Consultation 1-2-3
4. Design of priority programmes	✓	✓			Participation in Working Groups	
5. Preparation of cost and financing framework		✓		Active involvement		
6. Design of monitoring system		✓				
7. Writing up of draft plan		✓	Consultation on draft	Consultation on draft	Consultation on draft	
8. Revision of draft and official plan approval		✓				Information & mobilization

Keeping in mind the different phases of the plan preparation process, the drawing up of the work schedule will then comprise the following steps:

1. *Identify the main activities:* to be completed within each phase (including capacity development activities).
2. *Define the expected outputs for each activity:* Of particular importance will be to specify clearly the type of written report(s) expected at the end of each planning phase, since these reports will serve as the major inputs for drafting the plan document at the end.
3. *Estimate time and inputs required:* Time to complete the different activities will vary from country to country, depending on the size of the country, the quality of the information system, the expertise available in the Ministry, etc. In any case, realistic time estimates are never easy to make and generally tend to be over-optimistic. As mentioned above, to prepare a strategic plan in a participatory way following a learning-by-doing approach takes time, but it is time well spent because of the capacity development benefits derived from it.
4. *Define responsibilities:* The preparation of a strategic plan is a complex undertaking in which many different actors are involved. In line with the organizational structure set up for the plan preparation, clear responsibilities and accountability lines for implementing the different activities and producing the expected outputs should be defined, in order to make the whole process manageable.
5. *Prepare a Gantt diagram:* The Gantt diagram,⁴ which gives a graphic representation of the different activities to be completed, is simple to prepare and easy to read. It is the preferred tool used by project managers in all sectors and is particularly well adapted to planning the plan preparation process and monitoring it later on.
6. *Prepare cost estimate and financing modalities:* Main cost items will depend upon the participation of stakeholders and the capacity building activities. Financing modalities need to be discussed with development partners at a very early stage.

4. In a GANTT diagram, each task is represented by a line, while the columns represent (depending on the duration of the project) the days, weeks, or months of the schedule. The estimated time for a task is modelled by a horizontal bar, the left end of which is positioned on the intended start date, with the right end on the intended end date. Tasks can be placed in sequential chains or carried out simultaneously. Simple software to prepare a Gantt Diagram is easily available on the internet.

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The Institute's aim is to contribute to the development of education throughout the world, by expanding both knowledge and the supply of competent professionals in the field of educational planning. In this endeavour the Institute cooperates with training and research organizations in Member States. The IIEP Governing Board, which approves the Institute's programme and budget, consists of a maximum of eight elected members and four members designated by the United Nations Organization and certain of its specialized agencies and institutes.

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About the Working Paper



To make progress in education, countries must have a clear vision of their priorities and how to achieve them. Many ministries therefore prepare strategic plans, which reflect this vision and help mobilize people and resources. Planning in most countries is influenced by local history, organization of the state, and available resources, as well as specific challenges such as natural disasters or armed conflict. Regardless of the particular circumstances, educational authorities need to carry out essential tasks such as analysing the education system, formulating relevant policies, then implementing these and monitoring their implementation, often jointly with their national and international partners.

Since its inception in 1963, IIEP has been supporting countries in their sector planning efforts, whether through training, research programmes, or technical collaboration. The 'Education Sector Planning Working Papers' series is based on nearly five decades of experience, gathered from numerous country partnerships.

Working Paper 2, *Strategic Planning: Organizational arrangements*, provides guidelines for the preparation process of an education sector strategic plan. It outlines the need for such plans, and the way to organize the planners, policy-makers and the technical staff in the ministries – defining their roles and responsibilities and the mobilization of necessary resources. The Paper also highlights the importance of adopting a participatory approach so as to involve the different stakeholders in the planning process.

Other Working Papers already available in this series include:

- *Strategic Planning: Concept and rationale* (Working Paper 1)
- *Strategic Planning: Techniques and methods* (Working Paper 3)

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Forthcoming papers will focus on other educational planning steps and tools, such as the policy formulation process, yearly operational planning processes, and the use of education simulation models.



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