

Environmental Scanning Is Vital to Strategic Planning

Educators can use environmental scanning techniques to anticipate social, economic, political, and technological changes that will affect our schools.

Regardless of which model of strategic planning a school system follows, the planners will find that the process calls for external scanning: gathering information about the social, economic, political, and technological environment in which the school system operates. These outside forces affect the system and must be considered throughout the planning process.

A few years ago, given the task of gathering external information for the planning committees of a large Maryland school district, I went to the literature for guidance. There I discovered very little material on environmental scanning for public schools. Eventually my interest led me to extensive reviews of the literature on scanning in business, government, nonprofit organizations, higher education, and private schools.

Later, as part of my doctoral research, I developed a list of suggested data for school districts to include in their scans.¹ While completing my dissertation, I helped a smaller Maryland school district in its initial scanning, participated in workshops on strategic planning, made presentations at research conferences, and discussed external scanning with many educators and planners in other fields.

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Educators frequently raise two questions about environmental scanning: (1) How does environmental scanning differ from what we are doing now? and (2) How can a school system develop or expand environmental scanning without large expenditures of time, money, and personnel? Both are important questions that should be answered early in the strategic planning efforts of any school district.

Basic Characteristics of Scanning

Most school districts are already doing some external scanning. They routinely collect demographic information, especially for facilities planning. Many

schools also compile and publish profiles describing the socioeconomic conditions in the community. These activities provide necessary information, but they are only part of what is meant by environmental scanning.

Environmental scanning differs from more traditional data gathering in four ways. First, it is more concerned with anticipating the future than with describing the present. Typically, districts use enrollment projections to anticipate demands on system facilities; but strategic planning requires that we expand such forecasting into as many areas as possible. For example, we can use the information gathered through environmental scanning to try to predict future demands for special education, trends in parental involvement, or community pressures for curriculum changes.

Second, environmental scanning is wider in scope than traditional data collection because it is based on the assumption that major impacts on the school system may come from unsuspected sources. To move from traditional data collection to environmental scanning, we must expand our search to social, economic, political, and technological indicators not previously considered. The intent is not to amass statistics but to watch for signals of

The State of the Children

Planning for the future of America's children demands knowledge about how they are doing today. The 1991 *KIDS COUNT Data Book* provides national and state-by-state statistics on how kids are doing—in absolute terms as well as in change over time—as gauged by eight measures of health, education, and social and economic well-being: percentage of low birth weight babies, infant mortality rate, child death rate, teen violent death rate, percentage of teen out-of-wedlock births, juvenile incarceration rate, percentage of children in poverty, and percentage of youth graduating high school. The numbers may not be encouraging, but documenting the problem is the first step toward a solution—the ostrich approach will not help the kids.

The *KIDS COUNT Data Book* may be purchased for \$12.50 from The Center for the Study of Social Policy, 1250 Eye Street, N.W., Suite 503, Washington, DC 20005, or call 202-371-1565.

changes which may present opportunities or pose threats for our schools.

Third, environmental scanning focuses on the interaction of events and trends. As data are collected, we need to consider how trends in one area may affect trends in another. Scanners keep one point uppermost in their minds: the importance of one event or trend may be magnified or neutralized by other simultaneous events. For example, one of the most important issues in any school district is federal, state, and local financial allocations for education. In order to predict and influence future budgets, we can learn to anticipate competition for public funds. Signals across the nation suggest that we can expect increasing demands for public health care funds and for services for senior citizens. Locally, therefore, we should monitor indicators of these trends, such as the rate of increase in health care costs, the number of public assistance recipients, and the percentage of senior citizens in the population.

Finally, environmental scanning is an integral part of the planning process. It is not a once-a-year report. Information on external events and trends is collected continuously and considered at each step in planning.

Resources for Expanding Scanning

Once educational planners recognize that scanning requires gathering information from broader sources and doing this continuously, they face the problem of implementing such a pro-

cess. One solution is to establish a formal scanning procedure either as a responsibility of a director for strategic planning or through a separate office or designated committee. Some school districts have chosen this route, but it is not necessarily the best one for every district.

Fortunately, school districts can expand their recognition of external issues informally—without the funds, personnel, and resources required for formalized scanning. Superintendents, planning directors, supervisors, and principals can encourage each person involved in planning to become more aware of the influence of the external environment. After all, strategic planning is first and foremost a way of thinking, and environmental scanning is the habit of continuously asking, *How might this event affect our school system now or in the future? What can or should we be doing about it?*

As everyone becomes more aware of external issues, the district can make greater and more regular use of the resulting insights. During each planning session, administrators can set aside a specific time for participants to share findings from their informal scanning, explore relevant external events and issues, evaluate the possible short- and long-term impacts of these events on the plans being developed, and consider ways the school system might capitalize on opportunities or prepare for threats. Discussion of social, economic, political, and technological changes is just as

important in curriculum planning sessions as in management, facilities, and fiscal planning. Such discussions can also be included in the agendas of other meetings of supervisors, principals, teachers, and community groups.

In addition to resources within the school system, there are many easily accessible outside sources of information. Local politicians and business leaders, for example, are highly sensitive to environmental changes and are usually willing to speak at meetings. Corporations can sometimes provide environmental data collected through their corporate strategic planning offices or through market analysis. Realtors, real estate appraisers, financial institutions, and major charitable organizations are other potential resources for statistics on the community. Local and state planning commissions, zoning offices, health departments, economic development services, and tourism departments regularly assemble data and make projections. In many instances these public offices are not only willing but required by law to provide data to school districts. The local chamber of commerce may be able to suggest further resources.

It is not necessary for each school district to establish elaborate formal scanning. However, the leaders of any school district attempting strategic planning must recognize the need to examine a broad range of external issues. By encouraging those involved in the planning process to become aware of the external environment, local educators can make consideration of these issues an integral part of their continuous planning process. □

¹The title of the dissertation was "Recommended Data for the First Step in External Environmental Scanning for Public School Systems."

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