



# Strategic Plan

of the International Baccalaureate Organization (IBO)

April 2004

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## **Section 1      Introduction: an IBO journey in strategic planning**

This strategic plan is the product of a planning process that has lasted a year and has involved a close partnership between the IBO and McKinsey & Company for whose *pro bono* support we are most grateful.

Interim reports on this process were made to the Council of Foundation meetings in Geneva and Mumbai during 2003. The feedback from those discussions and others, involving the new strategic planning committee and IBO directors, resulted in a first draft of the strategic plan that was presented to the Council of Foundation in January 2004. A second draft was widely circulated for consultation during March 2004. This final version was approved by the Council of Foundation in April 2004.

This new plan forms part of a sequence of long-term thinking that started when the IBO was founded in 1968. However, in one important respect it is significantly different in that for the first time it addresses the challenge of managing the rapid growth that has always been a feature of the organization.

The IBO has established a high reputation as the world's leading organization in the field of international education. The way in which we work is determined by a number of core values.

- Motivated by a mission: we aim to create a better world through education.
- International-mindedness: we embrace diversity.
- Quality: we value our reputation for high standards.
- Participation: we actively involve our stakeholders.
- Partnerships: we achieve our goals by working together.
- Pedagogical leadership: we innovate in educational practice.

The challenge facing us to today is both to develop our programmes and services, and to make them available to a more diverse range of students, teachers and schools. This will require imagination, careful planning and the identification of new sources of funding. In particular, it will require the careful management of the IBO's growth so that, while the quality of our work is enhanced, we also reach out to disadvantaged schools and developing areas of the world.

The plan is a high level document that defines the direction of the organization as well as broad goals for 2014. It is the foundation of stage 2 of the strategic planning process (see appendix A) in which every directorate will produce a functional/regional strategy with detailed implementation plans and budgets (see appendix B). This aims to be a sustained and participatory approach that embeds our strategy into every part of the organization's activities.

## Section 2      The IBO: mission, values and act of foundation

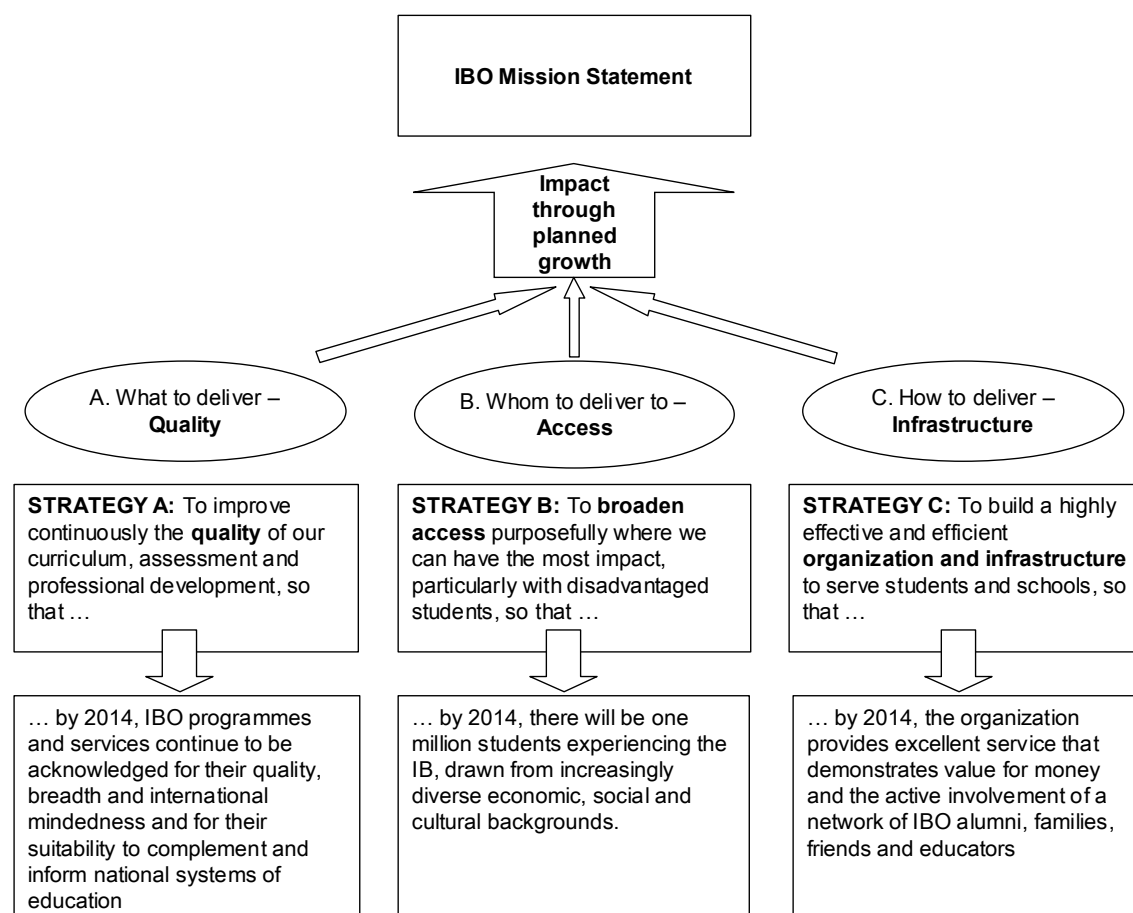
<b>The Mission Statement</b>	<b>Core values</b>	<b>The Act of Foundation</b>
<p><i>The International Baccalaureate Organization aims to develop inquiring, knowledgeable and caring young people who help to create a better and more peaceful world through intercultural understanding and respect.</i></p> <p><i>To this end the IBO works with schools, governments and international organizations to develop challenging programmes of international education and rigorous assessment.</i></p> <p><i>These programmes encourage students across the world to become active, compassionate and lifelong learners who understand that other people, with their differences, can also be right.</i></p>	<p><b>Motivated by a mission</b> <i>we aim to create a better world through education</i></p> <p><b>International-mindedness</b> <i>we embrace diversity</i></p> <p><b>Quality</b> <i>we value our reputation for high standards</i></p> <p><b>Participation</b> <i>we actively involve our stakeholders</i></p> <p><b>Partnerships</b> <i>we achieve our goals by working together</i></p> <p><b>Pedagogical leadership</b> <i>we innovate in educational practice</i></p>	<p><i>To develop and promote programmes of international education for students at the primary, middle and upper secondary school level for adoption by authorized schools in all countries;</i></p> <p><i>To develop, administer and promote an international examination for authorized schools giving access to higher education in all countries;</i></p> <p><i>To take such actions as are necessary to support these purposes, including but not limited to, educational research, curriculum and assessment development, teacher professional development, consultancy practice, conferences, publishing, and collaboration with governmental, intergovernmental, educational and other institutions.</i></p>

Founded in 1968, to date the IBO has authorized 1,123 Diploma Programme schools, 259 Middle Years Programme schools and 138 Primary Years Programme schools in 115 countries. We examine nearly 60,000 students per year in the Diploma Programme and train thousands of teachers each year in workshops and at conferences. We employ 300 staff and have a turnover of US\$45m. The organization has grown consistently at the rate of about 15% per annum for the past 10 years.

## Section 3 Strategy

The IBO has a responsibility to act in a manner that creates the most effective impact through its mission within the scope of its resources. We can do that by planning to achieve an optimum balance of three factors.

- What we deliver—**quality**
- Whom we deliver to—**access**
- How we deliver—**infrastructure**



Growth can be considered in a number of dimensions. For example: growth in the quality of our programmes; growth in the number of students; growth in the professionalism of the organization. Our emphasis is not on growth *per se*, but rather on the **planning** of growth to achieve the most effective and balanced impact possible.

We have identified a series of **strategic actions** to help us implement these three strategies. They are presented in summary in section 4 of this document and in more detail in section 5. They are listed according to which of three **bands** they most support, although individual objectives will frequently achieve benefits across the bands.

Banding is used to identify countries or areas where the IBO is already active with a strong school network (band 1), areas where we have the most potential for future impact (band 2), and areas where we are unlikely to be able to achieve critical mass in the medium term

(band 3). Banding will take place regularly and will take into account factors including the educational difference we can make, the openness of a country to alternative education systems, the local network and support the IBO has available, the size of the potential student pool, the availability of good quality alternatives and the potential for funding of IB programmes. Banding will help us to ensure that our resources are used in ways that increase our chances of optimizing impact.

## Section 4 Strategic actions in summary

	A—Quality	B—Access	C—Infrastructure
<b>General (0)</b> Entire organization	A0.1 Establish key <b>quality measures</b> for curriculum, assessment and workshops.	B0.1 Complete and regularly update the country <b>banding and project portfolio</b> . B0.2 Monitor key <b>growth and progress measures</b> .	C0.1 Build an efficient and effective <b>organization</b> . C0.2 Ensure a <b>reliable assessment</b> operation. C0.3 Evolve an effective <b>regional</b> structure. C0.4 Establish an <b>IB Association</b> for individual memberships. C0.5 Establish key <b>performance measures</b> . C0.6 Write a <b>resource development</b> strategy.
<b>Band 1</b> Established IB World School network	A1.1 Strengthen the <b>international dimension</b> of IB programmes. A1.2 Monitor <b>content quality</b> . A1.3 Ensure our <b>curriculum and assessment</b> are world-class. A1.4 Support <b>research</b> into the effectiveness of IB programmes. A1.5 Ensure the worldwide quality of IBO <b>professional development</b> .	B1.1 Support <b>existing schools' growth</b> . B1.2 Develop <b>recognition</b> with universities and governments.	C1.1 Monitor <b>service quality</b> to schools. C1.2 Ensure <b>self-sustaining programmes</b> C1.3 Strengthen <b>regional offices</b> .
<b>Band 2</b> High potential for future impact	A2.1 Develop <b>additional programmes</b> .	B2.1 Respond to the <b>banding</b> exercise. B2.2 Extend <b>language provision</b> . B2.3 Make use of <b>innovative technology</b> including e-learning. B2.4 Explore additional <b>delivery models</b> .	C2.1 <b>Collaborate</b> with other agencies. C2.2 Evolve a <b>consultancy</b> capability. C2.3 Cultivate major donors and establish a <b>long-term relationship</b> .
<b>Band 3</b> Lacking critical mass		B3.1 Explore <b>collaboration</b> options.	

## Section 5 Strategic actions in more detail

This section describes each of the actions proposed by the plan. Readers are reminded that this plan is a high level document that defines the direction of the organization as well as broad goals for 2014. The process by which detailed plans and budgets will be developed is described in appendix A and B and will be subject to the normal management, decision making and budgeting processes of the organization.

As an indication, next to each action is an indication of the most likely source of funding:

1. From within the 2004 budget (already approved)
2. From future budget submissions in 2005 and beyond
3. From external fundraising/development
4. No additional funding needed.

To provide some sense of the anticipated investment, we have also indicated a target timescale over which resources will be required:

- A. Short term (1 to 2 years)
- B. Medium term (3 to 5 years)
- C. Long terms (6 years plus)

Finally, we have indicated the likely level of resource required for each action using an indicative scale of:

- x. Minor
- y. Significant
- z. Major

### **A—Quality**

To improve continuously the quality of our curriculum, assessment and professional development through the following strategic actions:

Action	Notes	Funding	Time-scale	Resource scale
A0.1 <b>Key quality measures</b> Establishing a series of key performance indicators for curriculum, assessment and workshop content quality—so that we understand and can measure the quality of our core activities.	This is a one-off activity to be implemented within current staffing/budget submissions.	4	A	x

Action	Notes	Funding	Time-scale	Resource scale
<p>A1.1 <b>International-mindedness</b> Strengthening the international dimension of IBO programmes and promulgating the values and practices of international education—so that IB programmes and services more fully reflect the values of the mission statement.</p>	<p>This is a slow-drip process affecting every aspect of our work.</p>	<p>1,2</p>	<p>B</p>	<p>x</p>
<p>A1.2 <b>Monitoring content quality</b> Recording and reporting a comprehensive set of key performance indicators for curriculum, assessment and workshop content quality—so that we can be confident that the quality levels are appropriate and consistent, and that any problems identified are promptly addressed.</p>		<p>2</p>	<p>A</p>	<p>x</p>
<p>A1.3 <b>Curriculum and assessment</b> Ensuring a process of regular review with participation by practitioners and examiners, appropriate staff development, committee membership, use of consultants and alliances with outside bodies—so that curriculum and assessment development is informed by the latest thinking and our programmes retain their reputation for high quality in a changing world.</p>	<p>This builds on current practice.</p>	<p>2</p>	<p>C</p>	<p>y</p>
<p>A1.4 <b>Supporting research</b> Increasing our support of research into the effectiveness of IB programmes and the nature of international education—so that research-based evidence on the achievement of our mission is published, and so that the IBO contributes to and learns from the growing field of research on international education.</p>	<p>Extra resource from reserves has recently been allocated to research to pursue priority projects.</p>	<p>1,2,3</p>	<p>B</p>	<p>y</p>

Action	Notes	Funding	Time-scale	Resource scale
<p>A1.5 <b>Professional development</b> Ensuring the worldwide quality of workshops through a quality assurance framework, and by working towards accreditation by external bodies—so that the level of teacher satisfaction with workshops increases; the effectiveness of workshops improves and we acknowledge the key influence of teachers in achieving the IBO’s mission in the classroom.</p>	<p>May also relate to B2.3 (eg. OCC technology development to improve teacher training).</p>	<p>1,2</p>	<p>B</p>	<p>y</p>
<p>A2.1 <b>Programme development</b> Developing additional programmes and selections or parts from a programme continuum, to be endorsed by the IBO, that are compatible with the mission statement, such as a vocational diploma or using part of a programme as has happened with the European Platform—so that IB programmes are compatible with a wider range of school organizational structures and students’ needs, and so that the mission of the IBO is achieved among a wider group of students.</p>	<p>The potential scope of this action means that a detailed study is necessary before it will be possible to quantify any actions.</p>	<p>2,3</p>	<p>C</p>	<p>z</p>

## B — Access

To broaden access purposefully where we can have the most impact, particularly with disadvantaged students through the following strategic actions:

Action	Notes	Funding	Time-scale	Resource scale
<p>B0.1 <b>Banding and project portfolio</b>            Completing and regularly reviewing the banding exercise to create a portfolio of fundable projects based on our strategic goals—so that we can: focus our resources where they will have the most impact; provide short-term set-up support to schools; and attract resources for development projects (for example, the German government funding the introduction of certain subjects in German in the Diploma Programme).</p>	<p>A greater staffing capacity to undertake communications and marketing work will be required within each regional office and will be the subject of budget submissions for 2005.</p>	2	B	y
<p>B0.2 <b>Monitoring growth and progress</b>            Creating a comprehensive set of projections, a model of the consequences of growth and a reporting process—so that we can plan for and manage growth while tracking our progress towards broadening access.</p>	<p>The strategic planning and management information departments will undertake this activity within current budgets.</p>	1	A	x
<p>B1.1 <b>Existing schools' growth</b>            Supporting authorized schools to promote and enlarge their existing programmes—so that we attract more students to authorized schools and help schools to create stronger programmes.</p>	<p>Costs will relate to developing materials to help schools market their IB programmes, and improvements to www.ibo.org so that detailed country and school information has a much higher visibility on the site. These costs will be managed within the communications budget.</p>	2	A	x

Action	Notes	Funding	Time-scale	Resource scale
<p>B1.2 <b>Developing recognition</b> Increasing recognition of our programmes by universities and governments—so that our programmes are recognized on a basis that is equitable in relation to national programmes.</p>	<p>Costs will relate to increasing levels of staff activity in regional offices so that more time can be committed to these activities. These costs will be managed within regional office budgets. (see B0.1)</p>	2	B	y
<p>B2.1 <b>Banding</b> Responding to the results of the regional banding exercise—so that we focus our resources in places where we can have the most impact.</p>	<p>We anticipate that regional offices will want to determine targeted activities to develop local links and promote IB programmes in band 2 counties. These costs will be managed within regional office budgets and by searching out external funding options.</p>	2,3	B	y
<p>B2.2 <b>Extending our language provision</b> Investigating options for offering IB programmes in additional languages while ensuring both quality and delivery—so that IB programmes become available in countries that do not routinely use one of the IBO’s working languages.</p>	<p>The goal of adding further languages (along the lines of German in the Diploma Programme) will be achieved through fund-raising once the German project has been fully evaluated.</p>	2,3	B	y
<p>B2.3 <b>Technology</b> Introducing innovative technology such as the online curriculum centre (OCC)—so that we can offer opportunities to students and teachers who are limited by resource, time or geography.</p>	<p>Research and pilots are currently underway in a number of areas (for example e-marking, electronic assessment, activities on the OCC).</p>	1,2,3	A,B	z

Action	Notes	Funding	Time-scale	Resource scale
B2.4 <b>Additional delivery models</b> Exploring the consequences and considering the introduction of new delivery models—so that we research new options for delivering our existing programmes.	A number of options are currently being investigated (eg. a vocational diploma) but any proposals in this area would require detailed consideration by the education committee before any recommendation is made.	2,3	C	z
B3.1 <b>Collaboration</b> Exploring options of collaboration with governments and other organizations that have the infrastructure to reach areas of low potential critical mass, or among schools—so that we can share resources to reach students in parts of the world that would otherwise be beyond our resources to access.	Financial needs will depend on the nature and purpose of the collaboration. The first stage is an evaluation of options.	2	A	x

## C—Infrastructure

To build a highly effective and efficient organization and infrastructure to serve students and schools through the following strategic actions:

Action	Notes	Funding	Time-scale	Resource scale
<p>C0.1 <b>An efficient and effective organization</b>            Building our internal organizational structures, performance and capacity (in finance, communications, human resource, facilities management, management information, information and communication technology, project support, strategic planning and fund-raising)—so that we can meet future challenges as the organization grows and develops, and the world about us changes; our performance and resource utilization compares favourably with similar organizations; we innovate and utilize best practice experience from elsewhere.</p>	<p>This action will require detailed attention by the functional/regional strategies.</p>	2	A,B	z
<p>C0.2 <b>A reliable assessment operation</b>            Ensuring that we have a comprehensive plan to maintain reliability and integrity under the pressures of change and growth so that the reputation of the organization continues to be protected; we continue to investigate and implement new approaches to assessment; we continue to be able to recruit and retain a high quality examining team.</p>		2	B	y
<p>C0.3 <b>An effective regional structure</b>            Reviewing the regional and sub-regional structures – so that we develop an increasing degree of regional autonomy and we ensure the best use of our resources given the IBO’s worldwide coverage.</p>		2	B	y

Action	Notes	Funding	Time-scale	Resource scale
<p>C0.4 <b>An IB association</b> Bringing into an association individuals (including alumni, parents, teachers, examiners and friends) who have an ongoing interest in the IBO—so that we build a community of support for the goals of the organization.</p>	<p>Costs for 2004 and 2005 will relate to research and piloting activities to test the feasibility of this proposal. McKinsey and Company are providing pro-bono consultancy. External funding will be required beyond any pilot stage.</p>	2,3	C	z
<p>C0.5 <b>Performance measures</b> Establishing a series of key performance indicators for the delivery of defined services—so that we understand the most important aspects of our service delivery, and have the capacity to collect data that allows us to measure our performance.</p>	<p>This is a one-off activity to be implemented within current staffing/budget submissions.</p>	4	A	x
<p>C0.6 <b>A resource development strategy</b> Developing a funding strategy for infrastructure development—so that we have the resources necessary to ensure a high- quality and up-to-date infrastructure.</p>	<p>This activity will be undertaken as a project by the development office</p>	4	A	x
<p>C1.1 <b>Monitoring service quality</b> Recording and reporting a comprehensive set of key performance indicators for service delivery to schools and others—so that we can be confident that our quality levels are appropriate and consistent, and that any problems identified are promptly addressed.</p>	<p>This implements the performance measures identified in C0.5.</p>	2	A	x

Action	Notes	Funding	Time-scale	Resource scale
<p>C1.2 <b>Self-sustaining programmes</b> Introducing a process of activity-costing and an action plan to ensure that each IB programme becomes financially self-sustaining—so that long-term cross-subsidy between programmes is removed.</p>	<p>Critical to this action is the availability of detailed costing data. The first step is therefore to implement a system of activity based costing. We are currently reviewing options for doing this within the 2004 1% budget allocation to strategic planning.</p>	1,2	B	x
<p>C1.3 <b>Strengthening regional offices</b> Ensuring quality in the provision of school services, using techniques such as banding to identify opportunities for growth, developing working practices, and mobilizing additional resources—so that we give effective, high-quality support to schools and achieve strong leverage from limited resources, and so that opportunities for widening access can be pursued.</p>		2	B	y
<p>C2.1 <b>Collaborating with other agencies</b> Seeking and working with partners who share similar values and goals in, for example, higher education, and with other international organizations, through initiatives such as Education For All —so that we can expand our capacity through the sharing of ideas and resources.</p>		2,3	C	x
<p>C2.2 <b>Consultancy</b> Establishing a consultancy capability so that we can collaborate with state systems of education in the development of national programmes—so that: national systems and others can benefit from an international perspective; the IBO can benefit from best national practice; and the IBO can manage its intellectual property responsibly.</p>	<p>A longer-term goal that would ultimately become a new source of revenue to the organization.</p>	2	B	x

Action	Notes	Funding	Time-scale	Resource scale
C2.3 <b>Long-term relationships</b> Cultivate major donors and supporters to establish a relationship—so that we can secure long-term commitments to support our work.	An existing activity of the development office that will be strengthened.	1,2	B	x

## Appendix A                      The strategic planning process

The plan is a high level document that defines the direction of the organization as well as broad goals for 2014. It is the foundation of stage 2 of the strategic planning process in which every directorate will produce a functional/regional strategy with detailed implementation plans.

This staged approach is designed to ensure that:

- top level goals are translated into the detailed activities of the organization;
- ownership of the plan is developed among those who are responsible for implementing it;
- there can be flexibility in the way in which the goals are achieved with an appropriate level of empowerment;
- the appropriate committees and specialists can give detailed consideration to every action;
- budgets are derived from detailed project plans;
- plans are developed in an evolving process that considers resourcing and funding levels;
- strategic planning is built into the life of the IBO, not just one department or committee.

	Stage 1 <b>Organizational strategy</b>	Stage 2 <b>Functional and regional strategy</b>	Stage 3 <b>Implementation plans</b>
<b>Key document</b>	Mission statement, IBO strategic plan	Functional/regional strategic plans	Project plans/work schedules
<b>Focus</b>	Impact, planned growth and IBO strategic actions	Responding to the IBO strategic actions	Implementing the functional/regional strategies
<b>Approved by</b>	Council of Foundation on recommendation of the Strategic Planning Committee	Council of Foundation on recommendation of committees and RACs.	Directors
<b>Financial framework</b>	Long term financial planning	3 year financial plan	Annual budget
<b>Executive officer</b>	Director general	Directors	Managers/staff
<b>Supported by</b>	Strategic planning director	Strategic planning department members	Project support office, if necessary
<b>Lifetime</b>	5 years plus with reviews	1 to 3 years with reviews	Less than 1 year
<b>Monitoring and review</b>	Strategic planning committee reporting to the Council of Foundation	Committees of the Council of Foundation/RACs through reports to the strategic planning committee	Directors reporting to Committees of the Council of Foundation/RACs

The organization will develop the capacity to implement, monitor and redevelop this plan through the strategic planning committee, the strategic planning department and the active involvement of stakeholders.

A project management methodology (based on international best practice in project management such as PRINCE 2 and PMBOK) is being developed and supported by the new project support office of the strategic planning department. This methodology requires that plans have clear objectives, ownership, budgets, timescales, a review process, etc. The senior management team has established a project board, chaired by the director general, to oversee the management of all projects and their prioritisation.

## **Appendix B                      Financial implications**

This plan is based on an assumption of growth. Planned growth is key to the future of the IBO, particularly because growth gives us the flexibility to develop and innovate. Beyond the resources created by our own activity and growth, the achievement of the plan will depend on our capacity to raise funds from other sources.

The current ‘actions’ are high-level statements of intent, not detailed plans of action. For example:

- develop recognition with universities and governments;
- evolve an effective regional structure;
- explore collaboration options;
- develop additional programmes.

It is important to stress that this strategic plan provides a clear sense of direction and a framework for future planning – not a substitute decision-making process. Detailed plans will be developed and approved within the context of the normal management, decision making and budgeting processes of the organization.

Given this staged approach, the detailed financial consequences of the plan will be developed during stage 2. As a consequence, a provisional indication of the likely scale and resourcing level of each activity has been provided in section 5.

The Council of Foundation has approved this plan as a statement of overall direction and intent. The short-term financial resources to deliver the plan have/will be requested through the normal budgeting process for 2004 and 2005.

Many actions are dependent on successfully securing external funding. Fund-raising will play an increasingly important role in funding the development of the IBO.

As stage 2 develops, it will be possible to produce a detailed 3-year financial plan (for 2006 to 2008) that will backup the standard annual budget submissions. In itself, this will be a very worthwhile improvement to the long term planning processes of the IBO.