

Teachers' Perspectives on Planning for School Improvement: Processes, Critical Factors, and Perceived Outcomes

ABSTRACT

Strategic planning and strategic action have been identified as valuable frameworks for school improvement. Therefore, school reforms in different parts of the world have mandated formal planning to support improvement. However, planning is only sometimes fully embraced and knowledge-based, raising questions about schools' efficacy in strategic planning and action processes. In that sense, developing a better understanding of strategic planning and action is critical. This study focuses on the school planning processes in Portuguese schools by exploring how three Portuguese schools engaged in strategic action planning processes. A qualitative approach was employed. School strategic processes, critical factors for high-quality strategic action and planning, and perceived outcomes of strategic action plans were identified. The findings indicate that schools have embraced strategic action plans, despite the difficulties encountered during the planning and implementing process. Planning was limited by deadlines, failing in teachers, and other stakeholders' participation. Limited financial support and human resources were identified as factors hindering plan implementation. Compromise to school mission was identified as the main factor facilitating planning and action. The results point to crucial challenges for policymakers and school leaders. It also has relevant implications for future research related to school improvement.

Keywords: School improvement; Strategy; Strategic planning; Qualitative study.

1. INTRODUCTION

School improvement is at the center of diverse school reforms worldwide (Hajisoteriou et al., 2018; Harris et al., 2015; Leithwood et al., 2006). Planning is presented as a valuable tool for school improvement, especially when tied to a specific mission and vision, setting a school strategy for a specific context (e.g., Davies, 2006, 2007; Eacott, 2008, 2011; Quong & Walker, 2010; Schlebusch & Mokhatle, 2016; Wanjala & Rarieya, 2014).

The concept of strategy is relatively new in educational literature and is predominantly related to school planning (Carvalho et al., 2021a). In this paper, we adopted a schoolwide perspective where the strategy has

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three core dimensions: (i) vision, mission, and direction; (ii) intentional thinking; and (iii) articulated decision-making and action (Carvalho et al., 2021a). Therefore, school plans are part of the school strategy based on and derived from a coherent and comprehensive strategy for a specific school. The plan's design and implementation should be related, articulated, and aligned with the school's global mission. The plan's implementation quality is related to the quality of the plan and planning process (Davies, 2006, 2007; Eacott, 2008, 2011; Meyers & VanGronigen, 2019).

Formal planning is usually mandated for school improvement (Agi, 2017; Al-Zboon & Hasan, 2012; Schlebusch & Mokhatle, 2016; Strunk et al., 2016). For instance, in Portugal, as in other countries, several educational reform policies have mandated formal planning for school improvement. In the last years, Portuguese schools have been asked to design strategic action plans (SAPs) regularly to foster students' success, personal and social skills, and community development (Ministry of Education, 2016). Consequently, school plans are regarded as a demand for improvement and a tool to guide the same.

Even though schools' strategic plans have been adopted extensively, little evidence exists about the value and the challenges of planning for schools' improvement (Carvalho et al., 2021a; Leithwood et al., 2006; Strunk et al., 2016), which is also true within the Portuguese educational system. Thus, some criticism exists that formal planning can produce considerable improvements in schools per se (Bell, 2002). It also addresses some consequences of the process of planning itself as the inability to recognize plan value due to a top-down imposition to schools, teachers, and administrators' overloading or rigidity of plan prescriptions (Bell, 2002; Fernandez, 2011; Strunk et al., 2016).

Some authors have analyzed school plans and process planning. Planning is not frequently fully embraced and knowledge-based, raising questions about schools' efficacy in strategic planning (Cheng, 2011; Davies, 2004; Wanjala & Rarieya, 2014). Prevalent planning practices in schools are usually short-term, based on the immediate needs of the school (Mbugua & Rarieya, 2014), and the focus has been the accomplishment of externally driven requirements (Meyers & VanGronigen, 2019). In terms of structure, plans are similar, typically listing goals and strategies (Meyers & Hitt, 2018). The set of realistic goals and the design for monitoring the plans are also problematic (Wanjala & Rarieya, 2014). Moreover, strategic plans tend to be elaborated by people who are often not involved in implementation, supporting the need for involvement and participation of the whole school community from the start (Fernandez, 2011). This issue is critical when considering school strategy, which should be the basis for plans, "as choosing a direction within a given context through leadership, and articulating that direction through management practices" (Eacott, 2008, p. 356). Aspects like direction, participation, intentional thinking, and decision-making are central to planning for school improvement (Carvalho et al., 2021a).

Therefore, when considering plan quality, the pursuing issues are relevant: The comprehensive and integrated nature of the plans, its alignment with the school vision, mission, and priorities, the option for research-based

strategies, a well-defined plan considering goals and implementation, a clear definition of a data-based and monitoring process, the community involvement and the provision of professional development opportunities (e.g., Dunaway et al., 2012; Fernandez, 2011; Gurley et al., 2015; Immordino et al., 2016; Strunk et al., 2016).

Overall, strategic planning and action are challenging for schools because it implies leaders' vision, direction and knowledge, strategic thinking and deliberation, teachers' participation, and community involvement (Cheng, 2011, 2015; Davies & Davies, 2010; Eacott, 2011; Garza et al., 2014; Sarafidou & Chatziioannidis, 2013; Strunk et al., 2016; Wanjala & Rarieya, 2014). One of the critical characteristics of strategic planning is the paradigm shift from short-term and crisis-driven planning approaches to broader strategic processes (Davies, 2003, 2006; Davies & Davies, 2006), supported by an integrated and holistic appraisal of a school's strengths and weaknesses involving the whole school community (Davies & Davies, 2006; Cheng, 2010).

Some authors argued that most stakeholders lack knowledge about strategic planning and implementation processes, debating on questions like how to conduct planning, how to implement plans, how to identify best-suited strategies, and how to evaluate them (Carvalho et al., 2021b; Fernandez, 2011; Wanjala & Rarieya, 2014). Therefore, it is crucial to have deep knowledge of strategic planning and strategic plans for school improvement. In this study, we explore the school planning processes in Portuguese schools in the context of the National Program for Academic Success Promotion, launched in 2016.

2. METHOD

2.1. DATA CONTEXT

As in other countries, the Portuguese educational reforms agendas reflect the need to improve schools, both in processes and results (Bellei et al., 2016; Chukwumah, 2015; Harris, 2010; Harris et al., 2015; Machado, 2017; OECD, 2020). Moreover, in Portugal, several school reform policies have mandated formal planning. For instance, in the last years, Portuguese schools have been requested to elaborate and implement Strategic Action Plans (SAPs) for students' success improvement (Ministry of Education, 2016).

Since the 1980s, the Portuguese government has mandated school programs for academic success, such as The National Programme to Promote Educational Success (Programa Nacional de Promoção do Sucesso Escolar, PNPSE, 2016) launched in 2016 (OECD, 2020). PNPSE is a comprehensive strategy to combat school failure and grade repetition with a solid emphasis on building capacity for teachers and school leaders (OECD, 2020). The idea suggests that school communities better know their contexts, difficulties, and strengths. Therefore, they are well-prepared to design strategic action plans at a school level to improve learning outcomes (Ministry of Education, 2016). This initiative invited Portuguese schools to apply for financial support with a Strategic Action Plan (SAP) for academic success.

SAP is a tool to guide and structure school action to address its core problems by defining aims and priorities in a participative and constructive manner (Verdasca et al., 2021). Some guidelines were provided for the SAPs' priorities at pedagogical (e.g., innovative pedagogical strategies, evaluation practices) and organizational levels (e.g., collaborative practices). Furthermore, SAPs' format and content (problem identification, beneficiaries, practice identification/name, goals, targets, indicators, activities, timeline, professionals involved, additional resources, and need for professional development activities related to the project) were also supplied. Guidelines and support for the planning process were also provided. A group of three people from each school received information and training during the planning process. Still, each school was instructed to ensure broad participation and dissemination of SAP elaboration and implementation.

The SAPs were elaborated and approved for the first time in July 2016. In September 2018, SAPs were reformed for continuity. Then, in 2020, they were reformulated concerning their priorities (OECD, 2020). Since September 2016, 663 Portuguese schools (of 811 public schools existing in Portugal) have implemented them (Verdasca et al., 2021). Therefore, SAPs are considered instrumental in school action and improvement in Portugal.

Hence, it is vital to analyze school planning processes in Portuguese schools, forming the focus of the present study. Specifically, we aim to explore the pursuing issues:

(i) planning, implementing, and monitoring processes for school improvement in the context of the National Program for Academic Success Promotion, launched in 2016, (ii) critical factors that can facilitate or hinder school planning and implementing plans and (iii) perceived outcomes of plans for school improvement.

2.2. PARTICIPANTS

As said before, we explored how three Portuguese schools engaged in strategic action-planning processes in the context of the National Program for Academic Success Promotion, launched in 2016. A qualitative design was employed to provide an in-depth understanding of the schools' and participants' experiences and to interpret successful strategic action plans. The purpose was beyond generalizing findings but included obtaining relevant and helpful information about strategic action plan processes.

As Table 1 depicts, the study involved 24 participants from the three selected schools (coded by 570, 590, and 669). The selection criteria used were the school type and location to have diverse perspectives from different contexts. Two schools were clusters of preschool to high school education levels (570, 590), and one was a Vocational, Educational, and Training school (669). Regarding location, one school was urban (590), one semi-urban (570), and one rural (669). The three schools' participants were teachers and leaders ($N_{570}=6$, $N_{590}=7$, and $N_{669}=11$). Each school's principal, strategic action plan coordinator (Project coordinator), internal evaluation team coordinator, and professional development center coordinator were interviewed. Teachers participated in a focus group in each school.

Table 1
Participants' characteristics

Code	Gender	Age	Professional role
570_C1	Female	57	Project Coordinator
570_P	Female	60	Principal
570_T1	Female	46	Teacher
570_T2	Female	50	Teacher
570_T3	Female	56	Teacher
570_CFAE1	Female	46	Professional Development Center Coordinator
590_P	Female	62	Principal
590_C1	Female	53	Project Coordinator
590_C2	Female	65	Internal Evaluation Team Coordinator
590_T1	Female	64	Teacher
590_T2	Female	47	Teacher
590_T3	Female	52	Teacher
590_T4	Male	56	Teacher
669_P	Male	45	Principal
669_C1	Female	45	Project Coordinator
669_C2	Female	46	Internal Evaluation Team Coordinator
669_T1	Male	38	Teacher
669_T2	Female	39	Teacher
669_T3	Male	42	Teacher
669_T4	Female	36	Teacher
669_T5	Female	43	Teacher
669_T6	Male	38	Teacher
669_T7	Female	43	Teacher
669_T8	Female	39	Teacher

2.3. DATA COLLECTION AND ANALYSIS

Data were collected within each school using multiple sources, including documents about the school, interviews with the principal and other stakeholders, focus group discussions with teachers, and previous surveys. Documents about the schools and data from the previous survey provided a better understanding and knowledge about each school. Interviews, focus groups, and surveys were related to strategic action plans and planning processes. Interviews and focus groups were semi-structured with open-ended questions to allow participants to reflect deeply. The structure and content were flexible, addressing some central dimensions of the study objectives (plan-

ning, implementing, and monitoring SAPs; critical factors facilitating or hindering school planning and implementing plans and perceived outcomes of plans for school improvement). All the interviews were tape-recorded and fully transcribed to ensure that no verbal information would be lost. Data were collected during 2018.

Before data collection, all relevant information for the schools and participants' informed consent was presented for ethical purposes. Ministry of Education and school principals have consented to the study. The participants were also requested consent. No personal information identifying each participant was requested, granting data anonymity. Participants had to complete an anonymous self-report online questionnaire, including an instruction sheet and a consent form. Participants were assured of confidentiality and informed that their participation was voluntary.

In our data analysis, we followed the six stages suggested by Creswell (2014). First, we organized data according to the school they were collected. Second, we read our data to understand it better, and concurrently, we kept notes about our thoughts. Thereafter, we examined our data for groups of meanings and tried to locate them in previous categories. Third, we continued the analysis and divided the data into categories (previous and emergent), with each category named. Fourth, we reorganized categories by areas of analysis. Finally, in the fifth and sixth stages of the analysis, we began looking at our data to substantiate these categories with raw data. In trying to establish the trustworthiness of the data, we examined and triangulated our data from multiple angles and different perspectives (Creswell, 2014). NVivo 12 software was used for data analysis.

3. RESULTS

In this section, we present and organize results into three themes: (i) strategic school processes, (ii) critical factors for high-quality strategic action and planning, and (iii) perceived outcomes.

3.1. PLANNING, IMPLEMENTING, AND MONITORING PROCESSES

In this study, strategic action included references to planning processes and implementing and monitoring plans' activities. In interviews and focus groups, participants made references to these three processes. Leaders, in particular principals and project coordinators, have presented more knowledge and information about the plans and processes used to design, implement, and monitor the plans. Teachers presented less information and knowledge on those issues. Moreover, they referred that they have limited participation in the planning processes although they have to implement the plans in some cases.

Planning processes were described using similar terminology prescribed by the Ministry of Education. The terminology included identifying a restricted group of three persons for training, elaborating a proposal, incorporating other teachers and stakeholders in the planning phase, and submitting the plan for approval.

Starting with how the plan was designed after we had training for that, we had limited time to perform and elaborate the plan. Of course, the plan had revisions, but it was not easy. We know our school, but we did not limit the elaboration of the plan to our ideas. We listened to our colleagues. We had meetings, but not many because we did not have time (669_C1).

For the elaboration of the plan, schools considered previous knowledge about the school and its specific needs, information about the school project and principal's project, and actions already in implementation in the school.

From a specific time when we started this planning process, starting with our school project as a frame and with the identification of the school needs that could be solved with this plan, she [plan coordinator] and other colleagues designed the plan (669_D1).

The participation of teachers and other stakeholders was also mentioned. Most participants referred to specific moments and ways of participation. Still, most mentioned some limitations in this participation related to the moment of the school year and time for the planning process. This limited participation was also commented on concerning the implementation process.

After the plan was concluded, we presented the plan to our teachers (669_C1).

Many teachers are involved in the activities and actions of the plan. There are activities we had before the plan, which involved many teachers working actively on it even though they did not know if this same action was from this plan or another (669_C2).

Monitoring processes were also mentioned. The description of these processes was incomplete, representing the monitoring processes themselves. Some participants reported problems with monitorization, such as limited ways of doing it and limited time to do it.

We made some questionnaires to evaluate what they [students] have learned, just simple documents. We did not have much time. Maybe if we had time, we could complete the work (570_T1).

In some cases, these processes were presented as a bureaucratic way of accountability. In other cases, it was presented as an opportunity for school improvement.

Despite regulating organizational evaluation for school improvement, the practices focus more on school organization than students' success. This focus enabled schools to look at their pedagogical

practices and what were the main implications for students' success. It allowed each school to look inside herself (570_CFAE1).

3.2. CRITICAL FACTORS FOR HIGH-QUALITY STRATEGIC PLANNING

Some critical factors for strategic action and planning were identified from the participants' perspectives. These critical factors may facilitate or hinder strategic planning and action.

3.2.1. PROFESSIONAL DEVELOPMENT AND TRAINING

Training for plans' elaboration is one of the factors mentioned. Participants agreed that it is an essential condition for planning and decision-making. However, not all participants identified the training offered by the Ministry of Education as adequate as necessary.

This plan started deficiently. The training was redundant. The trainer did what she was supposed to; she came and replicated the training she already had (590_C1).

Training for plans' implementation was also mentioned as an essential factor but only sometimes offered on time and with the necessary quality for professional development related to the strategic plan.

One part of the plan was related to training, but training was stopped because of the absence of financial support. It would be an added value. However, training came two years late, and when it came, the plan for two years needed to be implemented in six months. Therefore, most training offered has no value and will not impact the school unless schools work on it (570_D1).

3.2.2. HUMAN RESOURCES

Participants referred to the quantity and quality of human resources as critical factors.

In this school, we had a big problem related to human resources because they were placed too late in the school year (...). Two teachers placed here by the Ministry of Education were the two biggest disaster professionals (669_D1).

The inadequate number of teachers and other professionals, the limited training offered at the time, and the inadequacy of some teachers selected were identified as factors hindering the plans' efficacy.

Some activities were not concluded because of insufficient resources. If there are no teachers, there are no spaces. It cannot be made. There is willingness, but there are no conditions to do it (590_C2).

3.2.3. TEACHERS' PARTICIPATION IN PLANNING AND IMPLEMENTATION PROCESSES

Teachers' participation and involvement in the planning process were essential factors impacting the knowledge and validation of the plan, the compromise to plan implementation, and the sense of belonging to a school community. Most participants referred to the limited participation during the planning process due to deadlines for the plan conclusion.

One of the significant failures was related to teachers' participation in planning. At that time of the school year, beyond the planning team and pedagogical coordinators, it was unlikely that all teachers participate and contribute to plans (570_CFAE1).

Despite these limitations, schools offered opportunities to present and discuss the plans.

The plan resulted from the goodwill of our principal. The other colleagues supported it (590_T1). The plan went to pedagogical departments to decide what to consider.

3.2.4. TEACHERS' COLLABORATION FOR SCHOOL IMPROVEMENT

Another factor concerning the plans' implementation was the collaboration between teachers. Most participants identified it as a facilitator for plans' implementation and monitoring.

It is fantastic to work in a group. Other colleagues suggest other ideas. When we started, we wanted to do this, but then we wanted to do more. So we end up much more involved, and we involve students. The positive aspect is also the conviviality between colleagues. We need to have trust and be open to criticism (669_T1).

3.2.5. COMPROMISE TO SCHOOL IMPROVEMENT

Compromise for school improvement emerged as a critical factor. Most participants connected this compromise to perceived outcomes.

The school struggled and bought material (...). The big struggle for the schools was maintaining the plan despite the absence of financial support for the necessary resources (570_D1).

We have willingness and practice that enabled mobilization to other situations (570_D1).

Many teachers are involved in activities and actions of the plan (...); they actively work in these processes (669_T2).

3.3. PERCEIVED OUTCOMES

Participants referred to limited outcomes when questioned directly about the impacts of these plans on students' success or school improvement. However, when talking about specific processes and activities, participants could identify related changes, mostly in school and professional improvement.

So, there are very different efficacy degrees when comparing actions proposed (...). This plan's strength was the practices the school needed to develop (570_D1).

The strength of this plan is what students learn (570_T2).

This plan was an opportunity to build a baseline to start the possible paths for our school (669_C2).

I think this is the bottom line to improve our school (570_T3).

In that sense, these plans were an opportunity to change teachers' visions about schools and teachers' practices.

4. DISCUSSION AND CONCLUSIONS

This study addresses strategic school processes, critical factors for high-quality strategic action and planning, and perceived outcomes of plans in Portuguese schools. The findings indicate that the schools analyzed have embraced strategic action plans, despite the difficulties encountered during planning and implementation.

At first, school leaders viewed strategic action plans as an external ministerial policy that schools should manage. However, at the same time, they viewed these plans as an opportunity for financial support. During the implementation process, they find an opportunity for school change, considering both perspectives and practices. Participants' perspectives are much more negative and focused on difficulties and limitations than positive aspects. This situation is particularly highlighted in teachers' groups of participants, which may be related to less participation and involvement during the planning and less value attributed to the plans for improvement. However, all the participants were able to identify strengths and outcomes of these plans.

When presenting strategic processes, participants have more precise ideas of what and how the planning and implementation occur than the monitoring process.

In planning, participants identified difficulties related to the knowledge about how to do it and its conditions, which may have contributed to the centralization of plan design in a small team of three persons and the limited participation of teachers and other stakeholders. Principals and project coordinators presented more information on these issues. As asserted by Wanjala and Rarieya (2014), knowledge about strategic action and strategic planning, the nature of its processes, the conditions mentioned above in its use, and the skills for planning in this manner are essential. Strategic planning does not guarantee a high-quality strategic action for school improvement, but it is necessary for well-succeeded actions (Davies, 2006, 2007; Eacott, 2008, 2011; Meyers & VanGronigen, 2019). The planning processes described have lacked critical conditions such as the intentional alignment between long-term school plans and this short-term plan, the teachers' involvement, and the necessary knowledge for plan design, especially on what to consider monitoring processes. This inadequacy leads to the argument that educational reforms that mandate school plans for improvement must be accompanied by the essential conditions supporting plan elaboration and implementation (Strunk et al., 2016; Wanjala & Rarieya, 2014).

Implementation processes primarily focused on insufficient resources. Initially, an expectation suggested that these plans would have financial support and resources. This expectation failed from the participants' perspective, associated with limitations in executing specific activities. Another crucial aspect discussed regarding implementation processes was professional development opportunities on plans. Participants referred to the limited opportunities they had at the time.

Moreover, five critical factors for planning were identified: (i) professional development opportunities, (ii) human resources, (iii) teachers' participation in planning and implementing processes, (iv) teachers' collaboration for school improvement, and (v) compromise to school improvement. These factors may operate as facilitators or barriers to plan planning and implementation.

Other studies indicate that financial support and resources are essential in ensuring plans' implementation (e.g., Wanjala & Rarieya, 2014). Sources of funding and resources in the three schools were limited and did not cover school needs. Schools depended on external decisions and actions to place teachers and other human resources where and when necessary, failing to meet school expectations and needs. The Ministry of Education externally and centrally controlled human resources placement.

Professional development and training are essential. However, the prior capacity-building for school strategic planning must be improved to give school leaders and other professionals the necessary knowledge to design and collectively reflect on the plans. The Ministry of Education provided short training to a selected team from each school, employing a cascading model. This training is criticized because it is prescriptive and ineffective (cf. Xaba, 2006). Nevertheless, this training lasted a short time, at the end of the school year, and only for a specific group, excluding other professionals and needing more time to be disseminated in the schools.

Another essential condition is making participation and collaboration a daily routine in schools (Carpenter, 2018; Sarafidou & Chatziioannidis, 2013). A key known element for high-quality school plans is the active and meaningful involvement and commitment of teachers and other schools' actors (Garza et al., 2014; Hajisoteriou et al., 2018; Louis & Lee, 2016; Pashiardis, 1994; Strunk et al., 2016). As asserted by Hajisoteriou et al. (2018),

By giving them [teachers] the opportunity to share their ideas and values and treat them as reflective practitioners, we unveil their perceptions, what they believe, perceive, and think about different areas that could eventually assist in improving the school setting (p. 2).

As elaborated by schools considered, strategic action plans were not supported by active participation and meaningful involvement. Schools made efforts to inform and collect contributions, but the deadlines and the number of tasks at the end of the school year limited this.

Despite difficulties and challenges related to strategic action plans, compromise to the school mission emerges as the top priority for maintaining and implementing the plan. Principals, other school leaders, and teachers mentioned willingness, effort, and previous practices influencing plan elaboration and execution. This idea is impressive when considering that participants highlighted that these plans were an opportunity to rethink school perspectives and practices. It resonates with the idea that strategic planning, within a strategic framework, "should be a declaration of a school's dedication to ongoing improvement" (Wanjala & Rarieya, 2014, p.19).

Our study deepens our understanding of strategic action processes for school improvement. Using a qualitative approach, it provided a contextually embedded description of strategic planning and implementation and clarified specific mechanisms of internal school organization for improvement. Even though each school had its contextual specificity, these cases had crucial implications for policy and practice.

One crucial implication derived from this study is that policymakers must play a key role in building capacities and conditions in schools to implement educational reforms effectively. Though usually well intended, these reforms could be better implemented (Xaba, 2006), raising questions about their efficacy. When considering strategic action and planning, leaders' and teachers' professional development is necessary. As stated by Wanjala and Rarieya (2014), "learning should be the starting point for schools effectively engaging in strategic planning" (p.26). As part of the strategic action for schools' improvement, training should adopt a whole-school learning approach and reinforce real engagement in professional development and collaboration opportunities (Bush, 2018; Day et al., 2011; Wanjala & Rarieya, 2014).

Despite its mentioned limitations, these educational reforms may urge people in charge to rethink actual schools' state and change needs. Creating need and motivation for change may substantially contribute to this national program, considering all the subsequent legal changes in education in Portugal. Fullan (1982) writes that "educational change depends on what teachers do and think – it is as simple and as complex as that" (p. 108). We may

say that the National Program for Academic Success Promotion uncovered paths for change when it explicitly identified national priorities and stimulated schools to present strategic action plans from the start. Even though they had limited financial support and resources, schools' compromise to their mission and improvement seemed to function as the motor of change. One can argue that change and improvement occur much more from the inside by its actors than external impositions (Hajisoteriou et al., 2018; Gurley et al., 2015). This argument challenges policymakers and school leaders to focus on creating conditions for teachers' and other stakeholders' involvement and compromise with the school. It must be added that in posterior editions of the National Program for Academic Success Promotion some of the critical issues mentioned were addressed and the results improved (Verdasca et al., 2021).

Some limitations of this study must be acknowledged. First, this is a study devoted to a specific program that required Portuguese schools to elaborate plans, namely "strategic action plans". Even though this particular program still exists in Portugal, SAPs were time-framed. The study results are limited to the specific plans and must be interpreted accordingly. Second, this study has explored teachers' perspectives about plans and planning process which highlighted interesting issues. However, these data were limited to specific schools and to a specific program, and comparative analysis was limited. As an exploratory qualitative study, it brings some interesting conclusions as presented and drives implications for practice and for research, but more research must be developed. As mentioned by Jarl et al. (2017), "in the search for variables explaining school success, close-up studies [such as case studies] of decision-making processes and patterns of action and interaction in schools are preferable" (p.20). However, the same authors suggest that case studies use a strategic selection of cases, making it possible for systematic comparisons based on variations and the possibility of test case study results using large-scale quantitative methods. These are valuable suggestions for future studies on school strategic action plans. Even though the schools and participants' selection were purposive and some comparisons were accomplished in this study, specific assumptions for strategic selection and systematic comparisons between successful and failing schools were impossible.

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Perspetivas de professores sobre o planeamento para a melhoria das escolas: Processos, fatores críticos e resultados percebidos

RESUMO

O planeamento estratégico e a ação estratégica foram identificados como marcos valiosos para a melhoria da escola. Por conseguinte, as reformas escolares em diferentes partes do mundo exigiram um planeamento formal para apoiar a melhoria. No entanto, o planeamento nem sempre é totalmente adotado e baseado em conhecimento, o que levanta questões sobre a eficácia das escolas no planeamento estratégico e nos processos de ação. Nesse sentido, é importante desenvolver uma melhor compreensão do planeamento e da ação estratégicas. Este estudo centra-se nos processos de planeamento nas escolas portuguesas, explorando a forma como três escolas se envolveram em processos de planeamento estratégico de ação. Foi realizado um estudo qualitativo. Foram identificados os processos estratégicos das escolas, os fatores críticos para uma ação e planeamento estratégicos de alta qualidade e os resultados percebidos de planos de ação estratégica. Os resultados indicam que as escolas adotaram planos de ação estratégica, apesar das dificuldades encontradas durante o processo de planeamento e implementação. O planeamento foi limitado por prazos bem como pelas limitadas oportunidades de participação dos professores e de outros intervenientes educativos. Apoio financeiro e recursos humanos limitados foram identificados como fatores que dificultam a implementação do plano. O compromisso com a missão escolar foi identificado como o principal fator que facilita o planeamento e a ação. Os resultados deste estudo apontam para desafios significativos para os decisores políticos e líderes escolares. Também tem implicações relevantes para pesquisas futuras relacionadas com a melhoria escolar.

Palavras-chave: Melhoria das escolas; Estratégia; Planeamento estratégico; Estudo qualitativo.

Perspectivas de los docentes sobre la planificación para la mejora escolar: procesos, factores críticos y resultados percibidos

RESUMEN

La planificación estratégica y la acción estratégica se han identificado como marcos valiosos para la mejora escolar. Por lo tanto, las reformas escolares en diferentes partes del mundo han exigido una planificación formal para apoyar la mejora. Sin embargo, la planificación no siempre se adopta plenamente ni se basa en el conocimiento, lo que plantea interrogantes sobre la eficacia de las escuelas en los procesos de planificación y acción estratégicos. En ese sentido, es importante desarrollar una mejor comprensión de la planificación y la acción estratégicas. Este estudio se centra en los procesos de planificación escolar en las escuelas portuguesas mediante la exploración de cómo tres escuelas participaron en los procesos de planificación de acciones estratégicas. Se utilizó un diseño cualitativo. Se identificaron los procesos estratégicos escolares, los factores críticos para una acción y planificación estratégicas de alta calidad y los resultados percibidos de los planes de acción estratégicos. Los resultados indican que las escuelas adoptaran planes de acción estratégicos, a pesar de las dificultades encontradas durante el proceso de planificación e ejecución. La planificación se vio limitada por los plazos, y por las escasas oportunidades de participación de los profesores y otras partes interesadas. El apoyo financiero y los recursos humanos limitados se identificaron como factores que obstaculizan la implementación del plan. El compromiso con la misión de la escuela se identificó como el principal factor que facilita la planificación y la acción. Los resultados de este estudio señalan importantes retos para los responsables por las políticas y los líderes escolares. También tiene implicaciones relevantes para futuras investigaciones relacionadas con la mejora escolar.

Palabras clave: Mejora escolar; Estrategia; Planificación estratégica; Estudio cualitativo.