



## What about us? Teachers' participation in schools' strategic action plans

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Schools in various parts of the world adopt plans or projects to improve the quality of school processes and students' learning. Therefore, it is important to understand the processes of strategic planning such as teachers' participation on decision making related to school plans. Apparently a limited number of studies have hitherto been conducted on teachers' participation in strategic planning. The purpose of this paper is to examine teachers' participation in decision making and strategic action planning in Portuguese schools. A survey employing self-administered scales was taken. Teachers' participation, other stakeholders' participation, planning, and decision making, professional development, plans' importance and validation, and ownership were the dimensions considered. Data were collected from 804 Portuguese teachers. Participants reported moderate to high levels of participation in strategic action plans, but they also reported moderate to low levels of participation in overall school decisions, plans' importance and validation, sense of ownership and recognition of relevant opportunities for professional development. These results indicate that participation and collaboration are essential determinants of plan and action success in educational contexts. The participative nature of decision making and

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strategic planning seems to underscore the relevance, value and adequacy of schools' plans from the perspective of teachers. However, differences in these dimensions related to teachers' experience and professional roles also point to lower levels of participation from some teachers, which may hinder their involvement in school actions and improvement. This study suggests the need to explore the dominant types of participation and collaboration in Portuguese schools and to analyse the importance of other variables.

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## **Introduction**

Schools in various parts of the world adopt plans or projects to improve the quality of school processes and students' learning (Bell, 1998; Leithwood et al., 2006; Mbugua & Rarieya, 2014). Generally, schools' improvement efforts are formalized in a school plan (a document), which is conceptualized through a formal planning process (Strunk et al., 2016). Similar to other countries (Ali, 2012, 2018; Davies, 2003, 2004; Eacott, 2008; Strunk et al., 2016), in Portugal, several school reform policies have mandated formal planning as a means of change and improvement. For instance, Portuguese schools were recently asked to elaborate and implement Strategic Action Plans (SAPs) to improve student success (Ministry of Education, 2016).

Despite the widespread use of plans, little evidence exists about the quality of school strategic plans concerning both their processes and outcomes (e.g., Leithwood et al., 2006; Strunk et al., 2016), and this is also true within the Portuguese educational system. Prevalent planning practices in schools are often short-term, usually based on the immediate needs of the school, and the main focus has been on the distribution of duties and resources as well as control budget and accountability (Mbugua & Rarieya, 2014). School improvement plans appear to be quite similar in terms of structure and content, typically with a listing of goals, objectives, and strategies (Meyers & Hitt, 2018). Few studies have examined the quality of these school plans, their translation into changed or improved practices, and the related outcomes over time (Strunk et al., 2016). Furthermore, research on strategic planning has identified fewer positive findings, supporting the idea that "the mere act of generating strategic plans in school reforms is not enough" (Strunk et al., 2016, pp. 263-264). Indeed, it is crucial to deepen our knowledge regarding the planning and implementing processes for high-quality school strategic plans for research, practical and political implications.

The main focus of the present study is to analyse school improvement processes (viz. planning and implementing) in Portuguese schools. Specifically, it is intended to analyse the critical processes of strategic planning and action related to SAPs. A key element for high-quality plans is the active and meaningful involvement and commitment of teachers and other school stakeholders (Garza, Drysdale, Gurr, Jacobson & Merchant, 2014; Hajisoteriou, Karousiou & Angelides, 2018; Louis & Lee, 2016; Strunk et al., 2016). This study is especially noteworthy because it appears that a limited number of studies have been conducted so far on teachers' or other stakeholders' participation in strategic planning in Portuguese schools. International research as well as Portuguese political guidelines have supported and reinforced the need for teachers' and other stakeholders' participation in this process as a condition for successful action (e.g., Garza et al., 2014; Hajisoteriou et al., 2018; Ismail et al., 2018; Labée et al., 2015; Louis & Lee, 2016; Machado, 2017; Ministry of Education, 2016; Myende & Bhengu, 2015; Strunk et al., 2016). Therefore, it is important to understand the processes and results of SAPs in Portuguese schools and, specifically, teachers' participation in decision making and plans. In this paper, the authors argue that

school improvement and strategic action cannot be established without the participation of key school actors. The following sections briefly conceptualize the importance of teachers' participation in school action plans and present an empirical study related to strategic action processes in Portuguese schools.

### ***Teachers' participation in strategic action plans***

Teachers' participation in decision processes is not a new topic in educational literature (cf. Muijs & Harris, 2003; Pashiardis, 1994; Smylie, 1992). Both empirical research literature and international educational policies have strengthened the importance of teachers' roles in decision making extending their involvement in the overall decision process. Several authors support the relevance of teachers' participation in decision making, thereby indicating that strategic planning is a joint and collaborative process (e.g., Cheng, 2011; Davies, 2004; Eacott, 2008; Friend, 2000; Leithwooth et al., 2006; Mbugua & Rarieya, 2014; Reynolds et al., 2014; Slater, 2006).

The collaboration of those involved in strategic planning seems to be a prerequisite both for successful planning and implementation (Ismail et al., 2018; Mbugua & Rarieya, 2014; Labée et al., 2015; Myende & Bhengu, 2015). This is related to the growing arguments that suggest that collaborative practices, embedded in the on-going behaviour of teachers, affect school improvement (Carpenter, 2018; Hajisoteriou et al., 2018; Ismail et al., 2018; Louis & Lee, 2016). Hajisoteriou et al. (2018) "claim that collaboration is not an adequate condition for school improvement" (p.16) but instead "is the cornerstone of school improvement in culturally diverse schools" (p. 17).

School improvement requires systematic and interactive processes of working together, both for planning and implementing strategic action. One important question to explore is related to the factors that promote teachers' participation and collaboration (Anjum, Islam, Choudhuri & Saha, 2021; Mbugua & Rarieya, 2014; Wadesango, 2012). In a qualitative study, Mbugua and Rarieya (2014) identified several factors that facilitate teachers' involvement in planning: (i) knowledge about the content and process of strategic planning; (ii) effective communication; and (iii) collaboration between stakeholders. On the other hand, top-down decisions, lack of autonomy, lack of knowledge and expertise about strategic planning, lack of vision and absence of shared experiences, individualized approaches and focus on formal aspects of planning were found to be factors that hinder teachers' full engagement in the strategic planning process. Additionally, other authors have highlighted the importance of creating time and opportunities for collaboration and the need to reinforce and involve teachers in collaboration processes (Clarke, Triggs & Nielsen, 2014; Friend, 2000; Sehgal, Nambudiri & Mishra, 2017; Slater, 2006; Wadesango, 2010). Indeed, collaboration is challenging and must be intentionally promoted and supported.

Despite the importance of participation and collaboration, their very nature varies significantly from school to school. Moreover, teachers' participation is not the same as? different issues/topics of discussion within the school context (Ho, 2010; Mualuko, Musaka & Judy, 2004; Sarafidou & Chatziioannidis, 2013; Wadesango, 2010, 2012). Previous research has reported that teachers are more active and express more desire for participation in instructional decisions rather than managerial decisions (Sarafidou & Chatziioannidis, 2013). In a quantitative study, related to the effects of teachers' participation in decision making, Sarafidou and Chatziioannidis (2013) identified student issues as the domain with the highest levels of reported participation by teachers. Concerning problems related to teachers



themselves, teachers reported moderate levels of actual participation in decision making. Last, teachers reported lower levels of actual participation in managerial decisions, even though teachers also reported low levels of interest or desire in participating in these sorts of decisions (Sarafidou & Chatziioannidis, 2013).

Combined, teachers' participation in schools' strategic actions or schools' decision-making process is a relevant issue (Gurley et al., 2015; Lahtero & Kuusilehto-Awale, 2013; Louis & Lee, 2016; Mbugua & Rarieya, 2014; Myende & Bhengu, 2015; Sarafidou & Chatziioannidis, 2013; Sehgal et al., 2017). Different dimensions related to teachers' participation are discussed in literature: (i) teachers' knowledge and participation in the process (Bellei et al., 2016; Cheng, 2011; Labée et al., 2015; Leithwood et al, 2006; Elmore et al., 2014); (ii) teachers' input in decision-making processes (Adelman & Taylor, 2007; Leithwood et al, 2006; Cheung & Cheng, 2002); (iii) teachers' sense of ownership and personal contribution to the process (Adelman & Taylor, 2007; Leithwood et al, 2006); (iv) teachers' perception of plans' efficacy to school improvement (Adelman & Taylor, 2007; Leithwood et al, 2006); and (v) professional development opportunities given to teachers in coherence with school strategic actions (Harris & Young, 2000; Cheng, 2011; Elmore et al, 2014). To sum up, teachers' participation in decision making and school improvement is highly recommended and must be reinforced by school leaders.

Considering the high resort of school strategic action planning in Portuguese schools and that few studies have been conducted on teachers' participation, the present study aimed to analyse Portuguese teachers' participation in school strategic action plans by taking into account the dimensions mentioned.

### ***School strategic action plans in Portugal***

The Portuguese educational reform agendas, as in other countries, reflect the need to improve schools both in processes and results (Bellei et al., 2016; Harris et al., 2015; Machado, 2017). The expansion of compulsory education until twelve years of formal education and the maintained academic underachievement rates compelled successive policies for reducing and preventing students' academic difficulties. Since the 80s, the Portuguese government have mandated school programs for academic success (e.g., Integrated Program for Promotion of Academic Success, 1989; Program Education for All, 1991; Plan for Elimination of Child Work Exploration, 1999; National Plan for Drop-Out Prevention, 2004; Educational Territories for Priority Intervention Program, 1996, 2006, 2012; Plus Academic Success Program 2009; National Program for Academic Success Promotion, 2016).

Changes in the above programmes reflect tendencies for a compromise between top-down and bottom-up processes (Machado, 2017). Specifically, the National Program for Academic Success Promotion, launched in 2016, is based on the idea that school communities best know their own contexts, difficulties, and strengths; thus, they are better prepared to design their own strategic action plans at a school level with the intent of improving learning outcomes (Ministry of Education, 2016). With this initiative, Portuguese schools were invited to apply for financial support, with a Strategic Action Plan (SAP) for academic success. SAP is defined as a tool to guide and structure actions related to the plan aims. Some guidelines were provided for SAP priorities at pedagogical (e.g., innovative pedagogical strategies, evaluation practices) and organizational levels (e.g., collaborative practices) and for SAPs' format and content (namely 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). Guidelines and support were also provided for the planning process. A group of three people from each school received information and training during the planning process, but each school was instructed to ensure broad participation and dissemination on SAP elaboration and implementation.

The SAPs were elaborated and approved in July 2016 and have been implemented since September 2016 in 663 Portuguese schools. In September 2018, action plans were expected to be internalized in the school mission and project (Verdasca et al., 2019).

## **Method**

### ***Research questions***

Considering the recent SAPs in Portuguese schools, the current study aimed to understand, from the teachers' perspective, if and how their voice was considered throughout the process. More specifically, the study had the following main research questions:

- (1) How do teachers perceive their participation in the SAPs process?
- (2) Are there differences in teachers' participation in SAPs considering teachers' gender, academic qualifications, and years of experience in the job?
- (3) Are there differences in teachers' participation in SAPs considering teachers' leadership role in the school?
- (4) Are there associations between teachers' participation in SAPs and teachers' knowledge about plans, other stakeholders' participation, participative nature of planning, recognition of importance and validation of plans, sense of ownership related to plans and professional development opportunities related to plans?

### ***Research procedures and participants***

The study was conducted with a sample of principals and teachers from Portuguese schools. Convenient sampling method was used to identify the participants. Participants were recruited nationally through an invitation letter sent by email to the principals of the 663 schools with SAPs. Contact with the potential participants was mediated by school principals. Informed consent was obtained from participants, from the school boards and the Ministry of Education, as required by the Portuguese Ministry of Education. No compensation was provided, and participants were guaranteed full confidentiality. All questionnaires were anonymous. Questionnaires were completed by participants using an online version accessed through a link sent with the invitation letter. Data were collected between January 2018 and February 2018.

The final sample consisted of 804 participants from a total of 539 different public Portuguese schools (see Table 1 for a description of sample characteristics). The sample was composed of 23,8% males and 76,2% females, and participants were aged 25 to 69 years ( $M=50.42$ ,  $SD=7.17$ ). Considering professional experience, 44,6% of the participants had 21 to 30 years of experience as a teacher, and 39,6% of teachers had less than 10 years of experience in the actual school. One participant did not report their age, two participants did not report their professional role, fifty-seven participants did not report their number of years as a teacher and forty-four did not report the number of years as a teacher in the actual school.



**Table 1** Sample characteristics

	N	(%)
Gender		
Male	193	24
Female	611	76
Educational status		
Graduation	534	66.4
Postgraduate studies	270	33.6
Years of experience as a teacher		
Less than 10	15	1.9
11-20	143	17.9
21-30	362	45
31-40	211	26.2
41-50	16	2
Years of experience as a teacher in the actual school		
Less than 10	318	39.6
11-20	263	32.7
21-30	148	18.4
More than 31	31	3.9
Role		
General council	9	1.1
Top leadership	180	22.4
Intermediate leadership	131	16.3
Class coordinator	144	17.9
Other coordination roles	122	15.2
Without additional roles	216	26.9

### Measures

The data were collected using two questionnaires: Participation on Strategic Planning and Action (PSPA) [Participação na Ação e Planeamento Estratégicos] and Strategic Action Processes for School Improvement (SAPSI) [Processos de Ação Estratégica para a Melhoria das Escolas]. These questionnaires were constructed by the ends of this study. No instruments were found to answer the research questions. Thus, a process of construction and validation of the questionnaires was performed (Carvalho, Cabral, Verdasca & Alves, 2018ab).

#### *Participation in Strategic Planning and Action*

The PSPA has 12 items on a 5-point scale that measures the degree of participation of teachers and other stakeholders on school strategic action plans. Considering previous literature review (e.g. Bellei et al, 2016; Cheng, 2011; Elmore et al, 2014; Leithwood et al, 2006), the scale was composed of two subdimensions: (1) Teachers' knowledge and participation, with nine items (e.g. "My degree of knowledge about the strategic action plan of my school is..."; "In my school, the degree of teachers' participation on strategic action plan design is..."); (2) Other stakeholders' participation, with three items (e.g. "In my school, the degree of parents' participation on strategic action plan is..."). Participants indicate their degree of knowledge or participation on a 5-point Likert scale (from "very low" = 1 to "very high" = 5, giving a possible maximum score of 75).

The scale' construct validity, item-factor correlations and item discrimination values were examined for the validity of the scale. First, Kaiser Meyer-Olkin (KMO) and Bartlett tests were carried out to determine the construct validity the scale. As a result of the analysis, KMO =0.917, Bartlett test was found to be  $\chi^2 = 5043,885$  ( $p = .000$ ). Second, within the framework of these values, it was observed that the 15-item scale was suitable for factor analysis. Exploratory factor analysis (EFA) and Cronbach' alpha coefficients revealed

problems with three items of the total of fifteen items of the initial scale version (items 7, 9 and 11). These items had a low alpha coefficient when compared to the items from their dimension, and internal consistency of the dimensions improved when these items were excluded. In addition, none of these items saturated in the same component as the rest of the items from their dimensions did, when EFA was performed with varimax rotation. As a result, we excluded the referred items from further analysis. Each of the twelve items presented a correlation with the total score ranging from .64 to .94, and the global internal consistency of the total scale, measured by Cronbach's alpha, was .95. Principal component analysis followed by Varimax Rotation provided two factors (F) that explain 78.59% of the variance: F1—Teachers' knowledge and participation, and F2—Other stakeholders' participation (Carvalho et al., 2018a). F1 explained 60.97% of the common variance, while F2 explained 17.63%. The Cronbach's alphas of these two scales were very good (DeVellis, 2012): .95 for F1 and .93 for F2.

### *Strategic Action Processes for School Improvement*

The SAPSI has 27 items on a 4-point scale that measure dimensions of school strategic action plans related to teachers' knowledge and participation, decision-making processes, and professional development related to school priorities. Considering previous literature review (e.g. Adelman & Taylor, 2007; Bellei et al, 2016; Cheng, 2011; Elmore et al, 2014; Harris & Young, 2000; Hopkins et al, 2014; Leithwood et al, 2006), the scale was composed of five subdimensions: (1) Participative planning and decision making, with twelve items (e.g. "In my school, the strategic action plan was designed considering teachers' perspective"); (2) Professional development, with three items (e.g. "In my school, teachers have professional development opportunities related to strategic action plan implementation"); (3) Strategic Action Plans' importance and validation, with four items (e.g. "In my school, the strategic action plan is a priority"); (4) Unipersonal and unilateral decision making, with three items (e.g. "In my school, the strategic action plan is designed by the principal"); and (5) Ownership, with three items (e.g. "I recognize myself on the strategic action plan of my school"). Participants indicated their degree of agreement with each statement on a 4-point Likert scale (from "strongly disagree" = 1 to "strongly agree" = 4, giving a possible maximum score of 108).

The scale's construct validity, item-factor correlations and item discrimination values were examined for the validity of the scale. First, Kaiser Meyer-Olkin (KMO) and Bartlett tests were carried out to determine the construct validity of the scale. As a result of the analysis, KMO =0.922, Bartlett test was found to be  $\chi^2 = 6119,643$  ( $p = .000$ ). Second, within the framework of these values, it was observed that the 27-item scale was suitable for factor analysis. Exploratory factor analysis (EFA) and Cronbach's alpha coefficients revealed problems with one item of the total of twenty seven items of the initial version of the scale (item 14). This item saturated in two different components when EFA was performed with varimax rotation. As a result, we excluded the referred item from further analysis. Each item presented a correlation with the total score ranging from .54 to .89, and the global internal consistency of the total scale, measured by Cronbach's alpha, was .95. Principal component analysis followed by Varimax Rotation provided five factors (F) that explain 70.02% of the variance: F1—Participative planning and decision making, F2—Professional development, F3—SAP importance and validation, F4—Unipersonal and unilateral decision making, and F5 – Ownership (Carvalho et al., 2018b). F1 explained 43.74% of the common variance, F2 explained 9.05%, F3 explained 6.99%, F4 explained 6.00% and F5 explained 4.24%. The Cronbach's alphas of these five scales were very good (DeVellis, 2012): .92 for F1, .93 for



F2, .89 for F3, .80 for F4, and .87 for F5.

### *Statistical analysis*

All analyses were conducted using IBM SPSS Statistics 24. Univariate analysis was used to identify the self-reported degree of teachers' knowledge and participation in SAPs and to analyse other strategic action processes. Bivariate analysis was used to investigate gender and educational status differences in knowledge and participation in SAPs and the other strategic action processes considered. Subsamples were used to have similar distributions of subgroups.

Differences considering other sociodemographic variables (general experience, experience in the actual school, professional roles) were assessed by one-way ANOVA, and the relationships between strategic action processes were analysed through Pearson correlations.

Assumptions of parametric tests were not satisfied (cf. Field, 2009). However, we computed both parametric and their equivalent nonparametric tests as advised by Fife-Schaw (2006). Given that the conclusions drawn from both sets of tests were the same in all cases, we opted to present the parametric test results because these are more robust and allow us to use multivariate analyses (Fife-Schaw, 2006).

## **Results**

### *Research question 1. How do teachers perceive their participation in the SAP process?*

Descriptive statistics of participants' responses to both questionnaires were considered to analyse teachers' perceptions of their participation in SAPs (cf. Table 2).

**Table 2.** Descriptive statistics of the questionnaires' responses

Scale	n	M	DP
PSPA Total	804	38.26	11.43
Teachers' knowledge and participation	804	3.65	1.04
Other stakeholders' participation	804	1.82	1.26
SAPSI Total	804	66.74	16.28
Participative planning and decision making	804	2.16	1.03
Unipersonal and unilateral decision making process	804	1.81	1.09
SAP importance and validation	804	2.77	1.03
Ownership	804	2.44	1.17
Professional development	804	1.72	1.24

Concerning teachers' perception about participation, teachers have higher averages when compared to other stakeholders. This means that teachers perceived themselves as having more knowledge and more participation on schools plans, both considering designing and implementing, than other stakeholders, parents, and students. In accordance, teachers identified themselves as authors and also validate strategic school plans considering the higher averages on irrespective subdimensions. On the other side, professional development is one subdimension with lower average.



**Research question 2. Are there differences in teachers' participation in SAPs considering teachers' gender, academic qualifications, and years of experience in the job?**

Tables 3 to 6 present differences in self-reported strategic action processes considering socio-demographic variables.

*Teachers' gender*

As presented in table 3, no gender differences were found in teachers' knowledge and participation, stakeholders' participation, unipersonal and unilateral decision-making process, SAP importance and validation, sense of ownership, or professional development opportunities. Significant differences between males and females were only found in participative planning and decision-making on SAP ( $t(449)=.87$ ,  $p=.019$ ), with males displaying higher scores. In other words, males' perceptions about the participative nature of planning and decision-making related to school plans are higher than females.

**Table 3.** Teachers' gender differences

	Male (n=193) Mean (SD)	Female (n=258) <sup>a</sup> Mean (SD)	t(449)
Teachers' knowledge and participation	3.70 (1.10)	3.66 (1.00)	.43
Other stakeholders' participation	1.83 (1.23)	1.91 (1.29)	-.74
Participative planning and decision making	2.30 (.93)	2.21 (1.04)	.87*
Unipersonal and unilateral decision making process	1.67 (1.03)	1.85 (1.10)	-1.74
SAP importance and validation	2.83 (1.04)	2.83 (.91)	-.01
Ownership	2.53 (1.20)	2.40 (1.11)	1.19
Professional development	1.90 (1.19)	1.73 (1.22)	1.50

\*\*\*  $p<.001$ ; \*\*  $p<.01$ ; \*  $p<.05$  <sup>a</sup>Subsample

*Educational status*

As in table 4, there were significant differences in teachers' knowledge and participation on SAPs ( $t(548) = -1.00$ ,  $p=.038$ ) depending on educational status, with higher levels found among teachers with higher education levels. This means that teachers who have higher degrees of studies identified themselves as having more knowledge and more participation on school plans when compared to teachers with lower degrees of studies.

**Table 4.** Teachers' educational status differences

	Graduation (n=280) <sup>a</sup> Mean (SD)	Postgraduation (n=270) Mean (SD)	t(548)
Teachers' knowledge and participation	3.62 (1.03)	3.71 (1.14)	-1.00*
Other stakeholders' participation	1.91 (1.22)	1.78 (1.23)	1.18
Participative planning and decision making	2.18 (1.05)	2.22 (1.01)	-.47
Unipersonal and unilateral decision making process	1.71 (1.10)	1.87 (1.03)	-1.67
SAP importance and validation	2.72 (1.08)	2.76 (1.06)	-.43
Ownership	2.42 (1.15)	2.57 (1.17)	-1.54
Professional development	1.68 (1.27)	1.90 (1.19)	-2.09

\*\*\*  $p<.001$ ; \*\*  $p<.01$ ; \*  $p<.05$  <sup>a</sup>Subsample



*Teachers' experience*

For teachers' experience variable both the number of years as a teacher and the number of years as a teacher in the actual school were delved into. Considering the Portuguese context, this distinction is relevant since, in many cases, teachers have long experience in different schools. In addition, some authors refer to tenure and functional track as relevant variables to consider in relation to schools strategy (e.g. Eacott, 2010). In this study, as presented in tables 5 and 6, participants with higher years of experience tended to present higher scores in all factors.

Considering years of experience as a teacher, there were significant differences in Knowledge and Participation ( $F(4,742) = 2.95, p=.020$ ), Participative planning and decision making ( $F(4,742) = 9.46, p=.000$ ), and in recognition of professional development opportunities ( $F(4,742) = 4.13, p=.003$ ). The Gabriel Post-Hoc Test evidenced differences in participative planning and decision making between teachers with less than 10 years of experience and teachers with experience between 21 and 30 years ( $p=.020$ ), between 31 and 40 years ( $p=.002$ ) and between 41 and 50 years. Significant differences were found between teachers with 11-20 years of experience and teachers with 21-30 ( $p=.001$ ), 31-40 ( $p=.000$ ), and 41-50 ( $p=.018$ ) years of experience. The Gabriel Post-Hoc Test evidenced significant differences in the identification of professional development opportunities between teachers with 11-20 years of experience and teachers with experience between 21 and 30 years ( $p=.015$ ) and 41 and 50 years of experience ( $p=.003$ ). To put in another way, teachers with more experience in profession seems to recognize the participative nature of planning more as well as opportunities for professional development related to school plans, when compared to teachers with less experience.

**Table 5.** Teachers' experience differences

	< 10 (n=15) Mean (SD)	11-20 (n=143) Mean (SD)	21-30 (n=362) Mean (SD)	31-40 (n=211) Mean (SD)	41-50 (n=16) Mean (SD)	F(4,742)
Teachers' knowledge and participation	3.24 (.83)	3.48 (1.02)	3.69 (1.06)	3.77 (.99)	4.03 (.86)	2.95*
Other stakeholders' participation	1.64 (1.52)	1.79 (1.36)	1.72 (1.23)	1.88 (1.19)	2.08 (1.03)	.85
Participative planning and decision making	1.53 (1.08)	1.82 (1.17)	2.21(.98)	2.40 (.88)	2.55 (.84)	9.46***
Unipersonal and unilateral decision making process	1.47 (1.23)	1.71 (1.26)	1.85 (1.07)	1.84 (.95)	2.42 (1.09)	2.04
SAP importance and validation	2.50 (1.15)	2.65 (1.05)	2.78 (1.05)	2.84 (.97)	2.94 (.69)	1.09
Ownership	1.84 (1.15)	2.30 (1.14)	2.50 (1.18)	2.54 (1.11)	2.75 (1.03)	2.35
Professional development	1.55 (1.25)	1.44 (1.22)	1.81 (1.25)	1.76 (1.17)	2.49 (.93)	4.13**

\*\*\*  $p<.001$ ; \*\*  $p<.01$ ; \*  $p<.05$  <sup>a</sup>Subsample

Considering years of experience as a teacher in the actual school, there were significant differences in Teachers' knowledge and participation ( $F(3,756) = 15.73, p=.000$ ), Participative planning and decision making ( $F(3,756) = 20.30, p=.000$ ), SAP importance and validation ( $F(3,756) = 6.28, p=.000$ ), sense of Ownership ( $F(3,756) = 10.51, p=.000$ ) and recognition of Professional development opportunities ( $F(3,756) = 12.79, p=.000$ ).

**Table 6.** Teachers' experience in actual school differences

	< 10 (n=318) Mean (SD)	11-20 (n=263) Mean (SD)	21-30 (n=148) Mean (SD)	> 31 (n=31) Mean (SD)	F(3,756)
Teachers' knowledge and participation	3.37 (1.05)	3.88 (.94)	3.74 (1.04)	4.16 (.83)	15.73***
Other stakeholders' participation	1.69 (1.38)	1.83 (1.18)	1.86 (1.08)	2.13 (1.17)	1.71
Participative planning and decision making	1.85 (1.12)	2.39 (.85)	2.38 (.94)	2.62 (.78)	20.30***
Unipersonal and unilateral decision making process	1.72 (1.20)	1.90 (.99)	1.88 (1.02)	2.08 (.94)	2.00
SAP importance and validation	2.61 (1.11)	2.94 (.92)	2.68 (1.04)	3.06 (.76)	6.28***
Ownership	2.20 (1.18)	2.72 (1.03)	2.44 (1.25)	2.72 (1.14)	10.51***
Professional development	1.42 (1.22)	2.00 (1.15)	1.80 (1.18)	2.09 (1.35)	12.79***

\*\*\* p<.001; \*\* p<.01; \* p<.05 <sup>a</sup>Subsample

The Gabriel Post-Hoc Test evidenced significant differences in teachers' knowledge and participation between teachers with less than 10 years of experience and teachers with more than 10 years (p=.000, p=.001, p=.000) in the actual school. Differences in participative planning and decision making were found between teachers with less than 10 years of experience and teachers with more than 10 years (p=.000, p=.000, p=.000) in the actual school. Differences in SAP importance and validation were found between teachers with less than 10 years of experience and teachers with 11-20 (p=.001) and more than 31 (p=.047) years of experience in the actual school. In professional development opportunities, differences were found between teachers with less than 10 years of experience and teachers with more than 10 years (p=.000, p=.007, p=.005). In the sense of Ownership, differences were found between teachers with less than 10 years of experience in the actual school and teachers with 11-20 (p=.000) and more than 31 years (p=.038) of experience in the actual school. To sum up, when considering teachers' experience in the actual school, differences are identified in a great number of variables. Teachers with more experience in the actual school seem to have more knowledge and recognize the participative nature of planning more, recognize its value more and feel like the author of the plans, and identify more opportunities for professional development related to school plans, when compared to teachers with less experience in the actual school.

**Research question 3. Are there differences in teachers' participation in the SAPs considering teachers' leadership role in the school?**

Table 7 presents differences between teachers considering their professional role in the school. Depending on teachers' roles in the school, there were significant differences in the strategic action processes, such as teachers' knowledge and participation (F (5,796) =63.34, p=.000), participative planning and decision making (F (5,796) =34.45, p=.000), unidirectional decision making (F (5,796) =3.97, p=.001), importance and validation (F (5,796) =23.92, p=.000), ownership (F (5,796) =50.54, p=.000), and professional development (F (5,796) =38.64, p=.000).

**Table 7.** Differences amongst teachers with different professional roles

	GC (n=9) Mean (SD)	TL (n=180) Mean (SD)	IL (n=131) Mean (SD)	CC (n=144) Mean (SD)	OCR (n=122) Mean (SD)	WAR (n=216) Mean (SD)	F (df=5,796)
TKP	3.84 (1.02)	4.46 (.51)	4.00 (0.79)	2.98 (1.07)	3.71 (.88)	3.18 (1.03)	63.34 (p=0.000)
SP	2.19 (1.29)	1.99 (1.04)	1.91 (1.17)	1.64 (1.39)	1.87 (1.25)	1.68 (1.35)	2.14 (p=0.059)
PPDM	2.19 (.48)	2.74 (.60)	2.46 (.86)	1.67 (1.12)	2.30 (.93)	1.74 (1.08)	33.45(p=0.000)



UDM	1.52 (1.02)	1.90 (.85)	2.11 (0.89)	1.63 (1.24)	1.83 (1.03)	1.67 (1.26)	3.97 ( $p=0.001$ )
IV	2.89 (.97)	3.31 (.67)	2.99 (.82)	2.31 (1.17)	2.83 (.93)	2.46 (1.09)	23.92 ( $p=0.000$ )
O	2.56 (1.37)	3.26 (.82)	2.84 (.85)	1.75 (1.07)	2.50 (1.07)	1.95 (1.17)	50.54 ( $p=0.000$ )
PD	1.76 (.96)	2.56 (.91)	1.98 (1.18)	1.17 (1.14)	1.77 (1.19)	1.20 (1.16)	38.64 ( $p=0.000$ )

GC - General Council; TL - Top leadership; IL - Intermediate leadership; CC - Class coordinators; OCR - Other coordination roles; WAR - Without additional roles.

TKP – Teachers’ Knowledge and participation; SP – Stakeholders’ participation; PPDM - Participative planning and decision making on SAP; UDM - Unipersonal and unilateral decision-making process; IV - SAPs importance and validation; O – Sense of ownership; PD - Professional development opportunities.

Considering the degree of teachers’ knowledge and participation on SAP, the Gabriel Post-Hoc Test revealed significant differences ( $p=.000$ ) between teachers with top leadership roles and the other groups of teachers, with or without leadership or additional roles (intermediate leadership roles, class coordinator, other coordination roles, without additional roles). There were also significant differences between teachers with intermediate leadership roles and class coordinators ( $p=.000$ ) and with teachers without additional roles ( $p=.000$ ). There were also differences between teachers with other coordination roles than those identified and class coordinators ( $p=.000$ ) and teachers without any coordination roles ( $p=.000$ ).

In participative planning and decision making, the Gabriel Post-Hoc Test evidenced differences between teachers with top leadership roles and class coordinators ( $p=.000$ ), with other coordination roles ( $p=.001$ ), and teachers without additional roles ( $p=.000$ ). There were also differences between teachers with intermediate leadership roles and class coordinators ( $p=.000$ ) and with teachers without additional roles ( $p=.000$ ). There were also differences between teachers with other coordination roles than those identified and class coordinators ( $p=.000$ ) and teachers without any coordination roles ( $p=.000$ ).

There were significant differences in the unipersonal and unilateral decision-making process between teachers with intermediate leadership roles and class coordinators ( $p=0.003$ ) and with teachers without additional roles ( $p=0.003$ ).

There were significant differences in the importance that participants attribute to SAP between teachers with top leadership roles and class coordinators ( $p=0.000$ , teachers with other coordination roles ( $p=0.000$ ) and teachers without additional roles ( $p=0.000$ ). There were also differences between teachers with intermediate leadership roles and class coordinators ( $p=0.000$ ) and with teachers without additional roles ( $p=0.000$ ). Differences were also found between teachers with other coordination roles than those identified and class coordinators ( $p=0.000$ ) and teachers without any coordination roles ( $p=.008$ ).

Significant differences exist in the degree to which teachers feel ownership and contribute to SAP between teachers with top leadership roles and the other groups of teachers with or without leadership or additional roles (intermediate leadership roles,  $p=0.004$ ; class coordinator,  $p=0.000$ ; other coordination roles,  $p=0.000$ ; without additional roles,  $p=0.000$ ). There were also differences between teachers with intermediate leadership roles and class coordinators ( $p=0.000$ ) and with teachers without additional roles ( $p=0.000$ ). Differences were also found between teachers with other coordination roles than those identified and class coordinators ( $p=0.000$ ) and teachers without any coordination roles ( $p=0.000$ ).

Considering self-reported opportunities for professional development related to SAP, the

Gabriel Post-Hoc Test evidenced differences between teachers with top leadership roles and the other groups of teachers with or without leadership or additional roles (intermediate leadership roles,  $p=0.000$ ; class coordinator,  $p=0.000$ ; other coordination roles,  $p=0.000$ ; without additional roles,  $p=0.000$ ). There were also differences between teachers with intermediate leadership roles and class coordinators ( $p=0.000$ ) and with teachers without additional roles ( $p=0.000$ ). Differences were also found between teachers with other coordination roles than those identified and class coordinators ( $p=0.000$ ) and teachers without any coordination roles ( $p=0.000$ ).

In summary, teachers with top leadership roles present higher averages on knowledge and participation, recognition of importance and validation of plans, sense of ownership related to plans and on identification of professional development opportunities when compared to other teachers. Moreover, other teachers with some leadership roles also have higher averages on most of the variables analysed, when compared to teachers without any additional role. These results may represent a relation between having additional responsibilities in school and teachers' participation.

**Research question 4. Are there associations between teachers' participation in SAPs and teachers' knowledge about plans, other stakeholders' participation, participative nature of planning, recognition of importance and validation of plans, sense of ownership related to plans and professional development opportunities related to plans?**

The correlation analysis in table 8 indicates a significantly positive relationship between the elements of PSPA and SAPSI.

**Table 8.** Correlation Matrix Analysis between PSPA and SAPSI factors

	TKP	SP	PPDM	UDM	IV	O	PD
TKP	-	.403**	.632**	.274**	.706**	.755**	.601**
SP		-	.478**	.157**	.365**	.274**	.380**
PPDM			-	.404**	.604**	.642**	.612**
UDM				-	.187**	.274**	.270**
IV					-	.662**	.555**
O						-	.653**
PD							-

\*\* Correlation is significant at the 0.01 level (2-tailed); \* Correlation is significant at the 0.05 level (2-tailed).

TKP – Teachers' Knowledge and participation; SP – Stakeholders' participation; PPDM - Participative planning and decision making on SAP; UDM - Unipersonal and unilateral decision-making process; IV - SAPs importance and validation; O – Sense of ownership; PD - Professional development opportunities.

The strongest relationship was between teachers' participation and ownership ( $r=.755$ ,  $p=.000$ ). The next strongest relationship was between teachers' participation and SAP importance and validation ( $r=.706$ ,  $p=.000$ ). Participative decision making ( $r=.632$ ,  $p=.000$ ) and professional development opportunities related to SAP ( $r=.601$ ,  $p=.000$ ) also had a strong and positive relationship with teachers' participation. Notably, participative decision-making and a sense of ownership were strongly related ( $r=.642$ ,  $p=.000$ ), and both dimensions also had strong and linear relationships with professional development ( $r=.612$ ,  $p=.000$ ;  $r=.653$ ,  $p=.000$ ) and SAP importance and validation ( $r=.604$ ,  $p=.000$ ;  $r=.662$ ,  $p=.000$ ). The SAP importance and validation and professional development opportunities had a strong relationship ( $r=.555$ ,  $p=.000$ ). The remaining elements were found to have only moderate to



small and positive correlations with each other (cf. Table 4). For interpretation of the correlation values, Cohen (1988) guidelines were considered (.10-.29 – low; .30-.49 – moderate; .50-1.00 – strong).

## **Discussion**

This study examines essential aspects related to successful school strategic action plans, such as teachers' and other stakeholders' participation, participative vs. unilateral/unipersonal decision-making processes, SAP importance recognition and validation, sense of ownership related to school plans and opportunities for professional development intentionally organized related to school plans. Specifically, some contributions may be made about how teachers participate in schools strategic plans (RQ1), how teachers differ in their participation on schools strategic plans (RQ2; RQ3) and how teachers' participation on schools strategic plans is related to other variables such as knowledge about the plans, attributions of importance and value to plans, sense of authorship related to plans and identification of relevant professional development opportunities (RQ4).

Teachers' participation is being considered as a relevant variable for school improvement and change (Garza et al., 2014; Hajisoteriou et al, 2018; Louis & Lee, 2016; Strunk et al., 2016). However, teachers' participation varies greatly depending on the school context (Mbugua & Rarieya, 2018; Slater, 2006), functional roles (Eaccott, 2010; Wadesango, 2012) and on the decisions' content and type (Ho, 2010; Sarafidou & Chatziioannidis, 2013).

In our study, participants reported moderate to high levels of participation in SAPs (RQ1), which is interesting to discuss in relation to some conditions that were created to participate in these specific plans and, also, in relation to other variables. Strategic action plans, in Portuguese schools, have a broad spectrum of incidence, including both pedagogical and organizational actions in a whole school approach (Verdasca et al, 2019). Even if teachers had not participate on plans' design, most of them had to participate on its implementation. This has an obvious impact on perceptions of teachers' participation and knowledge about school plans. Besides, we need to acknowledge that during the preparatory phase, ministry of education have recommended a broad participation and dissemination of SAPs. As teachers perceive their participation on school plans, they also recognize its importance and its role on it (Adelman & Taylor, 2007; Anjum et al, 2021; Clarke et al, 2014; Leithwood et al, 2006). Participants reported moderate to low levels of participation in overall school decisions, SAP's importance and validation, the sense of ownership, and recognition of relevant opportunities for professional development.

Some other variables may explain differences in terms of teachers' participation on school plans (RQ2). In our sample, males perceived the strategic action more as a participative process when compared to females, and teachers with higher degrees of studies admit more knowledge and participation on strategic action plans. These results should be analysed in relation to functional roles that teachers have in their schools. A great number of teachers of our sample are top or intermediate leaders, a group in Portuguese context may be higher represented by males and by teachers with postgraduate studies (cf. OECD, 2018).

One other variable that explains specific differences between teachers in terms of participation on school strategic action plans is experience as a teacher. Teachers with more years of experience in the actual school indicated having more knowledge about school plans, tended to participate more in school decision making, and reported plans' importance and ownership. Previous studies have reported some differences in strategy and strategic action

considering tenure and functional track (e.g. Eacott, 2011), supporting the idea that time spent in school and in specific roles may influence professional actions in schools.

Having a leadership role seems to be related to teachers' participation in school plans as to the other variables considered in the scope of this study (RQ3). Top and intermediate leaders reported higher levels of knowledge and participation in school plans, higher recognition, validation of its importance, and a higher sense of ownership. Our results point that teachers with leadership or managerial roles participate more in schools plans, which probably relates to the higher averages on knowledge, value recognition and ownership also presented by these teachers when compared to other teachers without additional roles. This is similar to other studies where decision making processes are frequently restricted to leaders or small group of teachers reducing the opportunities of a large participation (Mbugua & Rarieya, 2018; Mualuko et al, 2009; Wadesango, 2011, 2012)

It can be argued that, even though the current legal framework in Portugal encourages the participation of teachers and other stakeholders in school decision making, it appears that, in practice, this is not fully realized. In this study, participants are still considering that teachers' participation in SAPs is moderate, and other stakeholders' participation is low. It appears that decision making and strategic planning are not participative, and they tend to be the responsibility of a restricted group or the management team. In the specific case of SAPs, this can be explained by the fact that these plans needed to be prepared in a short period by a group of three persons, as suggested by the Ministry of Education guidelines. In addition, as in other countries, there is still a tendency towards an individualistic paradigm in Portugal, where some leaders neglect conditions and opportunities for collaboration and participation (Mbugua & Rarieya, 2018; Slater, 2006) and where some teachers are reluctant to seek greater involvement in decisions, mainly of school or managerial nature (Sarafidou & Chatziioannidis, 2013). These conditions weaken schoolwide participation in planning and decision making related to SAPs.

In this study, as in other studies, teachers' participation is related to other relevant variables of strategic action (e.g. Adelman & Taylor, 2007; Bellei et al., 2016; Cheng, 2011; Labée et al., 2015; Leithwood et al, 2006; Elmore et al., 2014). A relationship was found among teachers' knowledge and participation and the perception of participative nature of decision-making processes, the importance attributed to school plans, a sense of ownership and authorship of the plans and the recognition of relevant professional development opportunities (RQ4). These results indicate that participation and collaboration are essential determinants of plan and action success in educational contexts. The participative nature of decision making and strategic planning seems to underscore the relevance, value and adequacy of schools' plans from the perspective of teachers, which is an important issue when considering high quality school plans (e.g., Garza et al., 2014; Hajisoteriou et al., 2018; Ismail et al, 2018; Louis & Lee, 2016; Myende & Bhengu, 2015; Strunk et al., 2016). However, differences in these dimensions related to teachers' experience and professional roles also point to lower levels of participation from some teachers, which may hinder their involvement in school actions and improvement.

Despite the critical role of school leaders in decision making, they also have to create conditions for whole-school participation in planning and implementing school plans. Translating vision and direction into action in school plans obliges leaders to generate strategic methods (Davies, 2003, 2004; Eacott, 2008), and such strategies may need to involve all school actors. As mentioned by Mbugua e Rarieya (2014), strategic planning should not be



limited to a school planning group or school administrators. Instead, teachers and other stakeholders need to be actively involved in the process of strategically planning for their school.

Active participation and collaboration need to be routine in school daily life. School administrators should encourage staff to participate in formulating strategic plans (Carpenter, 2018; Cheng, 2011; Seghal et al., 2018).

Collaboration requires a commitment on the part of each individual to a shared goal, demands careful attention to communication skills, and obliges participants to maintain parity throughout their interactions. Collaboration does not occur because of administrative mandate, peer pressure, or political correctness. Nor does it occur by proclamation. (Friend, 2000, p.1)

Therefore, it is necessary to create conditions for the recognition of the importance and relevance of collaboration but also to organize time and space to intentionally support collaboration endeavours. Considering all of the above, school leaders have an important role for facilitating teachers' interactions, stimulating reflection and participation and, through this, ownership and involvement from teachers and other stakeholders (Gurley et al., 2015; Louis & Lee, 2016; Sehgal et al., 2017). More than referring to the traditional means of improving teachers' preparation, it is necessary to create supportive school environments (Louis & Lee, 2016; Slater, 2006). Collaborative cultures and professional learning communities need to be reinforced for school improvement and strategic action. It obliges a paradigm shift "from single institution to the creation of a community that more effectively solves problems and meets needs requires a new way of thinking about working together" (Slater, 2006, p.220).

The results of the present study contributed to a deeper understanding of participatory decision making and strategic action planning in Portuguese schools. Though these make up a relevant contribution, there are limitations to this analysis, mainly because of sampling and sample distribution and data collection process. In our sample, principals may be overrepresented which have impacts on averages related to their own participation in decision processes. Also, it was not possible to directly associate teachers' responses to principals' responses. That would be an interesting point of analyses to explore teachers' participation but also strategies to improve that participation at different schools. In future studies, it would be interesting to examine the impact of different types of participation and collaboration on SAP results and to dwell upon the relationship among other organizational variables and SAP processes and results. Additionally, for practical reasons, it would also be interesting to analyse specific aspects related to the content and format of SAPs. For example, evidenced-based and innovative practices are being studied for high-quality strategic action plans (Thessin, 2015), and this is of great importance for supporting decision making in education.

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