

Principals' Experiences Leading Strategic Planning in High-Performing Primary Schools in Trinidad and Tobago

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ABSTRACT

In the education system in Trinidad and Tobago, only 60% of students are achieving mastery in literacy and numeracy as documented by national tests. The purpose of this basic qualitative study was to explore principals' experiences leading strategic planning designed to increase achievement in literacy and numeracy in eight high-performing primary schools in Trinidad and Tobago. Fullan's change process theory provided the framework for the study. Data were collected from interviews with eight principals. Data analysis included coding, categorizing, and identifying themes. Findings indicated that principals plan, implement, and monitor the facilitation of change processes through in-depth strategies in teaching and learning with a continuous focus on literacy and numeracy. Findings also revealed that there is continuous professional development to support teachers and transform their capacity in practice. The extension and confirmation of knowledge were validated by the change process theory that change process at the campus level of the school must include strategies for improving the school. Findings may be used to evaluate strategic planning quality and assessment practices in low-performing schools in Trinidad and Tobago, and to improve principals' capacity for effective strategic planning.

Keywords: Literacy, Numeracy, Leadership, Strategic Planning.

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INTRODUCTION

Education is a vital component to the socioeconomic development of a country. Education is indispensable in all spheres of human life (The Government of the Republic of Trinidad and Tobago, Ministry of Planning and Development, 2016). The Government of the Republic of Trinidad and Tobago, Ministry of Education (2015) has institutionalized a School Based Management Model, and a strategic assessment of the education system highlighted the need to improve the leadership and management of schools through strategic planning. Strategic planning is an instrument of quality assurance to aid in the sustainable development of schools to adapt to changes in policies and market forces (Myende & Bhengu, 2015). Successful implementation of strategic plans provides a blueprint for leadership practices to ensure the achievement of students' value outcomes (The Government of the Republic of Trinidad and Tobago, Ministry of Education, 2015). The purpose of this qualitative study was to explore principals' experiences leading strategic planning designed to increase achievement in literacy and numeracy in eight high-performing primary schools in Trinidad and Tobago. Fullan (1983) posited that the theory of change points to how transformation occurs using knowledge to develop strategies that institutions can use as a foundation for academic success. The findings from this study may help to inform principals about strategic planning and processes that have been found to be successful in high-performing primary schools. Through the medium of strategic planning, students' foundational skills in literacy and numeracy may improve and may facilitate improvement in national test scores. The academic potential of students may improve, thereby providing a pathway to graduation at the primary, secondary, and tertiary levels. Principals' capacity for leading strategic planning may also be developed, thereby promoting social change in the education system. This will be evident by strategic planning designed to increase achievement of students' literacy and numeracy skills. The Ministry of Education can also use the findings of the study to engage in education policy initiatives.

PURPOSE OF THE STUDY

The purpose of this qualitative study was to explore principals' experiences leading strategic planning designed to increase achievement in literacy and numeracy in eight high-performing primary schools in Trinidad and Tobago. This study focused on seven high-performing primary schools from Trinidad and one high-performing primary school from Tobago.

RESEARCH QUESTIONS

The primary research question was the following: What are principals' experiences leading strategic planning designed to increase achievement in literacy and numeracy? The study addressed the following subquestions:

RQ1: How do principals in high performing primary schools in Trinidad and Tobago lead strategic planning processes designed to improve student performance in literacy and numeracy?

RQ2: How do principals in high performing primary schools in Trinidad and Tobago facilitate change processes through the stages of planning, implementation, and monitoring in strategic planning designed to address student performance in literacy and literacy?

REVIEW OF LITERATURE

Strategic Planning

Strategic planning is a model that allows the leadership of schools to document a strategic picture of the school in the present time, identify the direction it needs to go, and outline its strategic direction for the future (Davies & Ellison, 1998). Each individual school needs to develop a vision of its curriculum offerings together with other dimensions of a school clearly documented to bring the vision into a reality (Beare & Slaughter, 1993; Caldwell, 1997; Handy, 1994). The process of strategic planning is built on three foundational stages that include strategic analysis that seeks to document factors that will influence the school in the present and in the future, strategic choice that allows stakeholders to identify options, evaluation of the options, and selection of the most appropriate strategy for suitability, acceptability, and feasibility, and strategic implementation to bring the vision into a reality (Johnson & Scholes, 1997).

Leadership and Leadership Processes

Leadership is considered as one of the key components of the school that directly impacts student achievement (Dutta & Sahney, 2016). Hallinger (2011) focused on evidence from 40 years of empirical research and highlighted that the leadership of schools needs to develop suitable leadership strategies based on the context, and the ability to build capacity for improvement initiatives. The leadership of schools should also possess personal skills inclusive of positive emotional intelligence, human relations skills, being considerate to the needs of stakeholders, including communication skills and empathy (Sun, Wang, & Sharma, 2014). Ultimately, regardless of the context of schools, the leadership must build a personal and professional resilience focused on planning for improvement, the development of the capacity of staff, coupled with acquiring and managing financial, physical, and maintaining relationships with human resources (Gurr, Drysdale, Clarke, & Wildy, 2014).

Instructional Leadership

Ng, Nguyen, Wong, and Choy (2015) posited that instructional leadership can be viewed through the lens of the narrow concept and a broader concept. The narrow concept examines instructional leadership as related to the actions of principals specific to teaching and learning. The broader concept embraces instructional leadership related to the following: implementation and communication of the school's vision, mission and goals, coordination of the curriculum, effective supervision and evaluation of instruction, constant monitoring of student progress, protection of the instructional time, promotion of professional development, provision of incentives for teachers, provision of incentives for students, and the maintenance of a high visibility (Harris, Jones, Cheah, Devadason, & Adams, 2017; Ng et al., 2015). If principals are to provide effective school leadership, principals as instructional leaders are required to have both declarative knowledge and procedural knowledge of school operations in order to effectively guide the process of developing pedagogically focused goals (Kitchen, Gray, & Jeurissen, 2016). Principals' pedagogical role and responsibilities as instructional leaders must be at the forefront to improve teaching and learning and at the same time attend to strategic planning initiatives

towards the effective leadership and management of schools (Karagiorgi, Afantiti-Lamprianou, Alexandrou-Leonidou, Karamanou, & Symeou, 2018).

Combined Practice of Transformational and Instructional Leadership

The leadership of schools must utilize a wide range of school leadership practices that are critical for stakeholders within the school to transform and sustain school improvement initiatives in a quest for overall performance and classroom instruction (Leithwood & Sun, 2012). Day, Gu, and Sammons (2016) utilized a mixed methods study to illustrate the leadership of schools use of transformational and instructional leadership practices to ultimately improve the core business of schools, that is, improved students' outcomes. The findings from the study highlighted that transformational and instructional leadership of schools are layered that must build and sustain a focus on the quality of teaching and learning. Specific actions must include: a redesigned leadership of staff teams, improvement in the assessment procedures, use of data driven decision-making and evidence-based decision-making, improved teaching policies and programs, strategically allocating resources, continuous adjustment and changes to the students' target setting (Day et al., 2016). The transformational leader focuses improvement on organizational qualities, organizational factors and variables, and in the transformation of overall school effectiveness (Shields, 2010).

Transformative Leadership: Leadership for Social Change

Transformative leadership has a focus on schools through the lens of justice and democracy and examines inequitable practices to ensure that the learning environment, and the social environment within schools produce a better quality for students (Quantz, Rogers, & Dantley, 1991; Shields, 2009; Weiner, 2003). Zapata, Percy, and Andrews (2018) noted that the strategic plans must address the equity lens specific to planning and decision making towards a clear statement of commitment in the promotion of access, inclusion, and equity. Transformative leadership promotes the action of the education leader to create appropriate learning contexts towards the provision of equity of opportunities for all students (Shields, 2010). The basis of transformative leadership is to reduce if not eliminate the deficit thinking and inequities in the education system towards the creation of new knowledge frameworks. This new knowledge framework will allow education leaders to lead by providing opportunities for all students to engage in purposeful pedagogies facilitated by high expectations (Shields, 2010).

Leadership and School Transformation

Meyers and Hitt (2018) reviewed 18 empirical studies and categorized leadership dimensions that should be attended to in the process of school transformation. The leadership of the principal in the establishment and maintenance of the vision, leadership of instructional initiatives, facilitated an environment conducive to teacher development and student achievement, and stakeholder involvement are important in building the capacity of stakeholders within schools (Hitt & Tucker, 2016). The empirical studies reviewed highlighted that the change processes within schools must direct the leadership of schools to use the vision of the school as a focal point for high academic expectations. It also highlighted that the leadership must build the capacity of teachers in the areas of instructional improvement with a focus on

accountability, and improve the climate of the school through the alignment of priorities directed towards teaching and learning, and creating the authentic relationships with parents and other stakeholders (Meyers & Hitt, 2018).

Promoting Professional Development

Professional development linked to improvement in teaching is an accepted theory of action as it aids teachers to translate ideas and innovative strategies into their system of practice (Kennedy, 2016). Kennedy (2016) reviewed 28 studies specifically examining professional development through the lens of theories of how students learn, and how teachers learn. The review of the literature from the 28 studies highlighted four constructs that must be considered in the development of professional development for teachers. Firstly, the most common reference point for professional development is the focus of content knowledge that must be threaded on the transformation of teachers' skills on strategies to develop student thinking. The next essential construct focuses on the collective participation of learning through the medium of professional learning communities by which teachers extensively discuss their intellectual work in addition to strategies for the development of teaching and learning. Another fundamental construct focuses on program intensity based on the cumulative number of contact hours which serves to be useful when strategies related to teaching and learning are shared. The fourth construct entails the use of subject specific coaches which has its strengths and weaknesses (Kennedy, 2016). Fullan (2011) reminds the leadership of schools that when professional development is built on teamwork and collaboration, the capacity of the teachers become advanced and they become innovators through their collective expertise.

RESEARCH DESIGN AND APPROACH

Research Design

The research approach was a basic qualitative design. Basic qualitative research is grounded on a theoretical framework to guide the analysis of the data based on the experiences of a target group that will add value to the knowledge in the field of study (Merriam & Tisdell, 2015; Patton, 2015; Ravitch & Carl, 2016). The strength of this study was exploring the experiences of eight principals from high-performing primary schools to document how they lead strategic planning.

Conceptual Framework

Fullan's (1983) Change Process Theory was used for this qualitative study. Fullan posited that change processes within a school are important if stakeholders within the school are to formulate strategies to improve schools. Change takes place over time, and change involves the acquisition of new skills through the medium of practice, continuous feedback, and organizational conditions at the level of the school (Fullan, 1983). These conditions determine the success of the process, and successful change is achieved through an interaction of organizational conditions within the internal and external environment of the school (Fullan, 1983). Fullan (1983) posited that change process at the campus level of the school must include strategies for improving schools. The theory of change focuses on how change occurs using

knowledge as the foundational base grounded on eight organizational factors including leadership focused on curriculum and instruction, district level support, emphasis on student development, high expectations for students, support systems and processes for monitoring performance of staff and achievement of students, continuous staff development, parental involvement, and promoting a healthy school climate (Fullan, 1983). Four process variables embedded in the factors include leadership aptitudes, a value system for stakeholders, intentional communication, and collaborative planning and collaborative implementation. When the eight organizational factors and the four process variables are supported, there is improvement in the achievement of the goals of the school, coupled with a strong sense of community and a capacity for further improvement through focused innovation and school-wide strategies (Fullan, 1983).

Setting, Population/Participants

The sampling procedure was criterion based through purposeful sampling of eight principals who are leading strategic planning in high-performing primary schools, including seven schools in Trinidad and one school in Tobago. The criteria for the selection of representative sampling of schools in Trinidad and Tobago were based on the number of schools from the two islands as a unitary state. Trinidad comprises seven education districts with a total of 446 primary schools, while Tobago, the smaller island, has one education division that comprises 44 primary schools. These principals were selected based on national test results from Trinidad and Tobago, which indicated the schools as having been promoted from mostly effective to excelling in the areas of literacy and numeracy consistently over a 4-year period. According to the Ministry of Education (2016), all primary schools are placed in one of four categories based on a composite score of zero to 560: academic emergency (0-80), academic watch (81-240), mostly excelling (241-400), and excelling (401-560).

Data Collection, Coding, and Analysis

Data were collected from eight principals who are leading strategic planning in high performing primary schools, seven schools in Trinidad, and one school in Tobago. Data was collected once, spanning period of approximately one hour, at each of the participant's school. The duration of data collection spanned over eight days, one day in each participant's school. Key elements of data analysis included coding, use of categories, and themes as connected to the data collected specific to the research questions. The verbatim interviews documented had rich meaning; and was highlighted for first level coding that was analyzed into categories, and then translated into themes. The use of reflective commentary through the use of journals at the data collection sessions, documenting emergent patterns in the process of data collection also provided allowance for monitoring the development data analysis. Member checks were also utilized in the instrumentation process to ensure that the participants scrutinized the accuracy of the transcripts based on their articulations which served to validate the accuracy of data analysis. Additionally, a co-worker, who is also a schools' supervisor, served as a second reader. The transcripts were read and matched against the codes, categories, and themes to ensure the accuracy of my interpretation of the data. It was anticipated that there was no discrepancy with the participants' responses as they truthfully documented their experiences related to strategic planning which presented a language of commonality in the education system.

RESULTS

Introduction

The purpose of this qualitative study was to explore principals' experiences leading strategic planning designed to increase achievement in literacy and numeracy in eight high-performing primary schools in Trinidad and Tobago.

Research Question 1

Research Question 1 asked the following: How do principals in high-performing primary schools in Trinidad and Tobago lead strategic planning processes designed to improve student performance in literacy and numeracy? The following seven themes were identified:

- leading strategic planning targeted toward school transformation,
- engaging in a continuous focus on literacy and numeracy,
- utilizing data-driven decision-making for curriculum and instruction,
- institutionalizing innovation and accountability,
- providing leadership driven by context,
- providing resources for literacy and numeracy through stakeholder involvement and partnerships, and
- institutionalization of strategies as an instructional leader to guide curriculum and instruction.

Theme # 1: Leading strategic planning targeted toward school transformation.

Leading strategic planning targeted toward school transformation was threaded on the belief that improved student performance and success for all students need to be planned for. The principals had the belief that in-depth strategic planning and goal setting formed the basis to monitor change processes towards targeted school transformation in literacy and numeracy.

Theme # 2: Engaging in a continuous focus on literacy and numeracy.

Even though the eight schools were high performing schools, the principals maintained a continuous focus on literacy and numeracy. This was achieved through the implementation and monitoring of literacy/numeracy intervention programs, as well as implementing specific strategies to close the achievement gaps. Evidence based and data driven decision making were consistently analyzed to monitor performance in a bid to focus on students' strengths and weaknesses. Student's progress was tracked utilizing data management systems. Literacy and numeracy committees served to provide continuous professional development to all teachers.

Theme # 3: Utilizing data-driven decision-making for curriculum and instruction.

Data driven decision making for curriculum and instruction embedded precision assessment strategies for teaching and learning. These strategies facilitated change processes

using specific strategies to close the achievement gaps, as well as to aid in the analysis of alternate solutions.

A diagrammatic representation of the codes used in data driven decision making is contained in Fig. 1.



Fig. 1 Codes used in Data Driven Decision Making

Theme # 4: Institutionalizing innovation and accountability.

Innovation and accountability facilitated change processes using precision strategies for documentation, as well as the use of accountability systems to track students' progress. Codes included: recording and reporting strategies, weekly, fortnightly, and monthly, and termly assessments. Students' behavior including social and emotional skills, participation in class, and the level of absenteeism were also noted. The magnitude of data was documented in the school data management system for tracking of progress by school officials and parents.

Theme # 5: Providing leadership driven by context.

Each of the eight schools was sampled from education districts in Trinidad and Tobago. The context of the schools ranged from urban, semi-rural, and rural areas. The principals posited that their leadership practices and leadership styles were based on their context. They also noted that the leadership style influenced decision making and integrated varied leadership styles. A diagrammatic representation of codes identifying leadership driven by context is contained in Fig. 2.

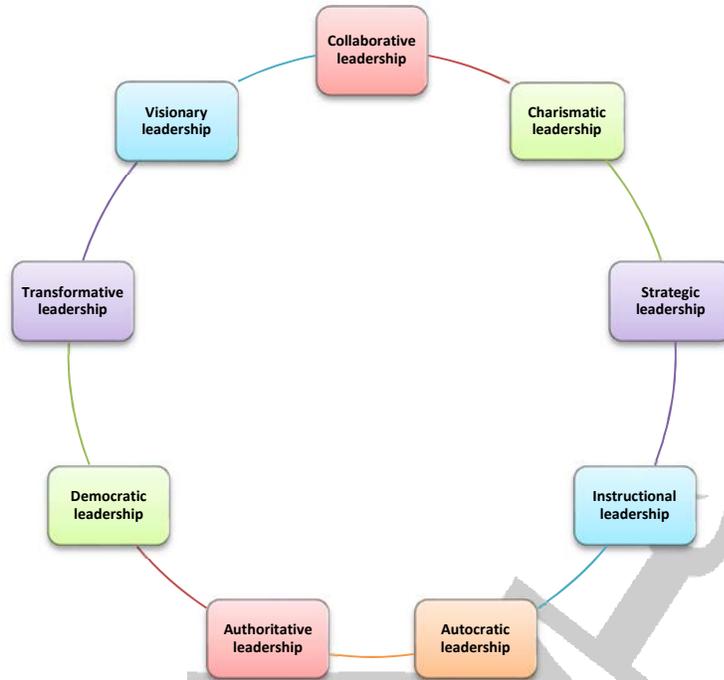


Fig. 2 Leadership Styles Driven by Context

Theme # 6: Providing resources for literacy and numeracy through stakeholder involvement and partnerships.

Stakeholder involvement and partnerships provided varied partnerships between the school and the school community. These varied partnerships include: The Ministry of Education, the Business Sector, the Local School Board, Community and Parental Support that provided resources for students' literacy and numeracy development.

Theme # 7: Institutionalization of strategies as an instructional leader to guide curriculum and instruction.

The role of the principal through instructional leadership extends beyond teaching and learning. The principal as instructional leader monitored and evaluated the implementation of key priorities, and strategies for student development. This ensured accountability in the development of students' knowledge and skills.

A diagrammatic representation of strategies used by instructional leaders is contained in Fig. 3.

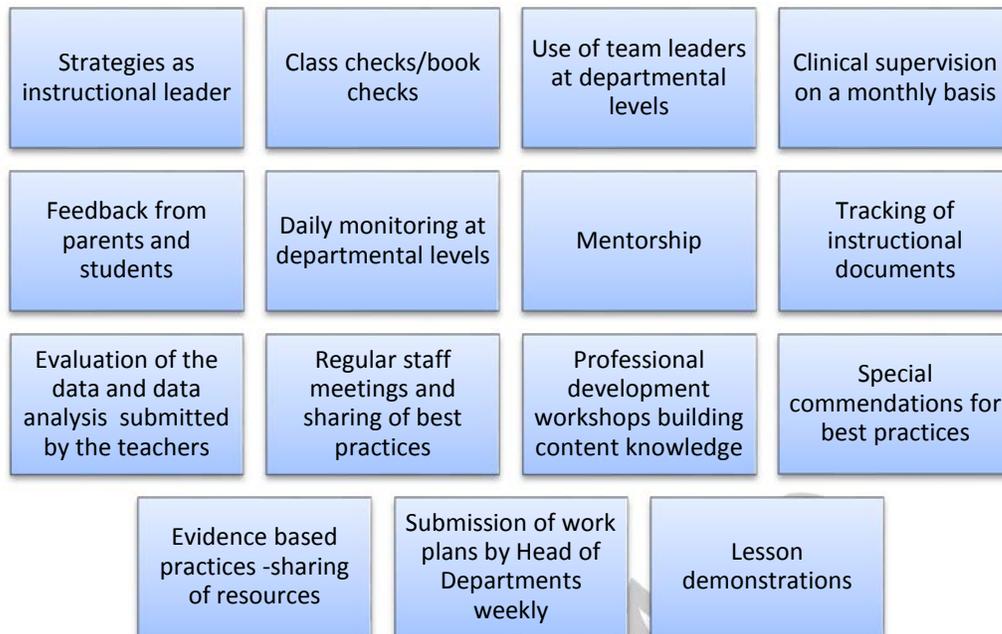


Fig. 3 Strategies used by Instructional Leaders

Research Question 2

Research Question 2 asked, how do principals facilitate change processes through the stages of planning, implementation, and monitoring, in strategic planning designed to address student performance in literacy and numeracy? The following themes were identified:

- ensuring successful implementation of teaching and learning strategies for improvement in literacy and numeracy, and
- providing continuous effective professional development programs to support teachers and transform their capacity in practice.

Theme # 1: Ensuring successful implementation of teaching and learning strategies for improvement in literacy and numeracy.

The principals noted that implementation of teaching and learning strategies facilitated change processes in the core business of schooling, teaching and learning. Codes utilized by teachers in the eight high performing primary schools are documented in figure 4.

A diagrammatic representation of strategies utilized in teaching and learning is contained in Fig. 4.

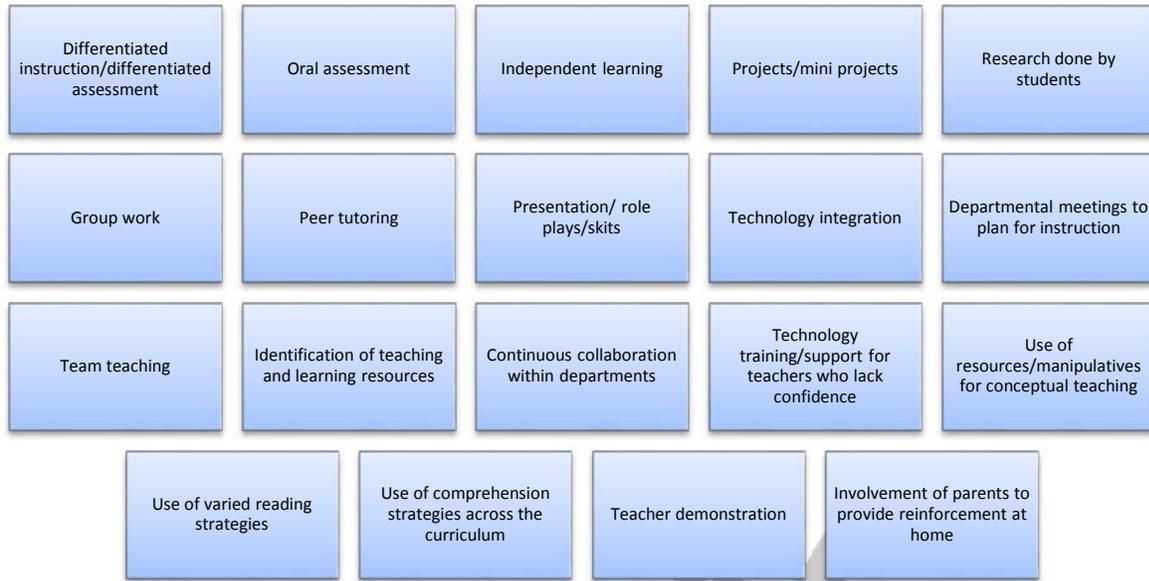


Fig. 4 Strategies Utilized in Teaching and Learning

Theme # 2: Providing continuous effective professional development programs to support teachers and transform their capacity in practice.

Providing continuous professional development builds the capacity of the teachers for effective curriculum delivery, builds collegiality and effective communication skills. A diagrammatic representation of effective professional development programs for capacity building is contained in Fig. 5.

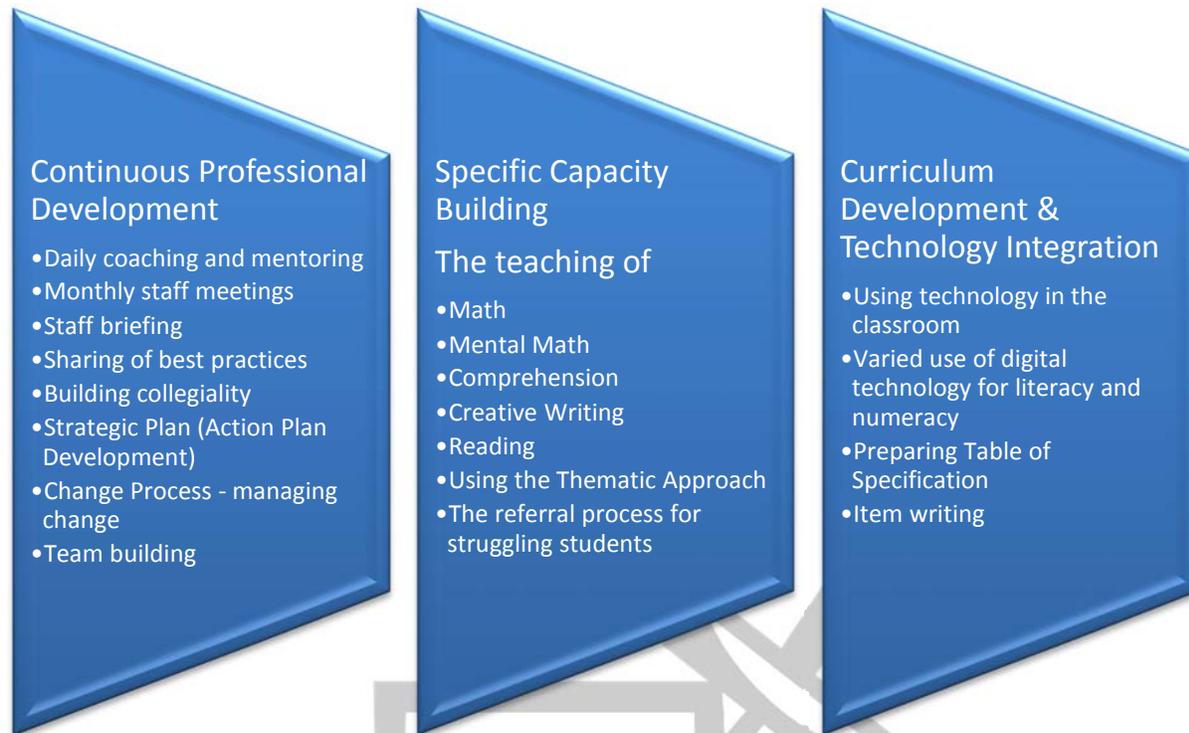


Fig. 5 Effective Professional Development

Interpretation of Findings

The findings of the study confirmed and extended the knowledge in the field of education related to leading strategic planning that is designed to increase achievement in literacy and numeracy. This confirmation of knowledge was validated by the major finding that the change process at the campus level of the school must include strategies for improving the school. The conceptual framework for this study was Fullan's (1983) change process theory. The theory of change focuses on how change occurs using knowledge as the foundational base grounded on eight organizational factors including leadership focused on curriculum and instruction, district level support, emphasis on student development, high expectations for students, support systems and processes for monitoring performance of staff and achievement of students, continuous staff development, parental involvement, and promoting a healthy school climate (Fullan, 1983). Four process variables that are embedded within the factors include leadership aptitudes, a value system for stakeholders, intentional communication, and collaborative planning and collaborative implementation (Fullan, 1983). The organizational factors and the process variables are fused and used as an innovation-focused strategy as the conduit to school improvement (Fullan, 1983). This theory informed the study as the change process intertwined with the eight organizational factors and the four process variables provided the foundation for transformation if there is to be improvement in literacy and numeracy. The change process theory provided a cohesive framework for analyzing the experiences of principals from high-performing schools with a focus on how they lead change processes targeting improved student performance.

The institutionalization of strategic planning supports the coordination of leadership and management of schools with the aim of improving the quality of teaching and learning (Ewy, 2009; Hodgson & Chuck, 2003; Taylor et al., 2008). The leadership of the principal in the establishment and maintenance of the vision, leadership of instructional initiatives, facilitation of an environment conducive to teacher development and student achievement, and stakeholder involvement is important in building the capacity of stakeholders within schools (Hitt & Tucker, 2016). The eight principals in the current study documented the types of assessment and reporting procedures used to inform data-driven decision-making, which will add value to teaching policies and programs, strategically allocated resources, and continuous adjustment and changes to the students' target setting. Principals hinted that their leadership styles are driven by the context of the school. Use of strong leadership support, the development of the capacity of staff, positive emotional intelligence, human relations skills, being considerate of teachers' needs, open communication skills, empathy, and maintaining relationships with human resources are also driven by context. Fullan (2011) reminded the leadership of schools that when professional development is built on teamwork and collaboration, the capacity of the teachers become advanced and they become innovators through their collective expertise.

CONCLUSIONS AND RECOMMENDATIONS

Recommendations

Based on the breadth and in-depth strategies of how principals lead strategic planning processes targeting improved student performance in the eight high performing primary schools, it is recommended that research be conducted to evaluate strategic planning quality targeted towards student achievement in low performing primary schools in each of the eight education districts in Trinidad and Tobago. An evaluation of the strategic planning quality will seek to determine the strategic planning initiatives for school transformation. Specific areas of focus can include: diagnosis of the school self-evaluation, literacy and numeracy initiatives to tackle underperformance, teaching, learning and assessment strategies, the depth of instructional leadership, and professional development. Strategic planning is a vital planning tool to aid in the sustainable development of schools as it fosters a collective vision through collaboration of stakeholders in the execution of duties and responsibilities towards students' academic achievement (Antoniou, Myburgh-Louw, & Gronn, 2016; Myende & Bhengu, 2015).

It is also recommended that research be conducted on assessment practices in low performing primary schools. The research should be focused on the areas of literacy and numeracy. The principals in the eight high performing schools documented in-depth assessment practices utilized. The purpose of assessments is to inform stakeholders within education districts about student and school performance in a bid to plan, implement, and monitor interventions for improvement of low performing schools and to ensure sustainability of practice in high performing schools. Additionally, assessments serve the purpose of informing education district leaders and education policy makers about accountability at the micro, mezzo, and macro levels of the education system (Education Commission of the States, 2017).

IMPLICATIONS

Significance to Practice

This study may potentially add value to the professional practice in the development of principals' effectiveness. Specifically, through the lens of successful strategic planning and change processes focused on improved literacy and numeracy. The body of knowledge documented through the medium of this study, principals at the primary school level may plan, implement, and monitor strategic planning policies to develop students' foundational skills in literacy and numeracy. This may have the potential for student achievement in all subjects across the curriculum. Principals' capacity and capability for leading strategic planning targeted towards student achievement may also be developed, that can promote the opportunity for social change in the education system.

Significance to Theory

Exploring principals' experiences leading strategic planning towards student achievement, advances the leadership practices of principals when planning for the improved academic achievement of students. Anyieni and Areri (2016) revealed that the leadership style of the principal has a great significance in the decision-making processes and also influences the implementation of strategic plans. Kai-Wing (2016) postulated that a principal's knowledge of leadership is an influential factor for visioning, networking, and enhancing stakeholders' capability that results in improved academic achievement and general organizational performance.

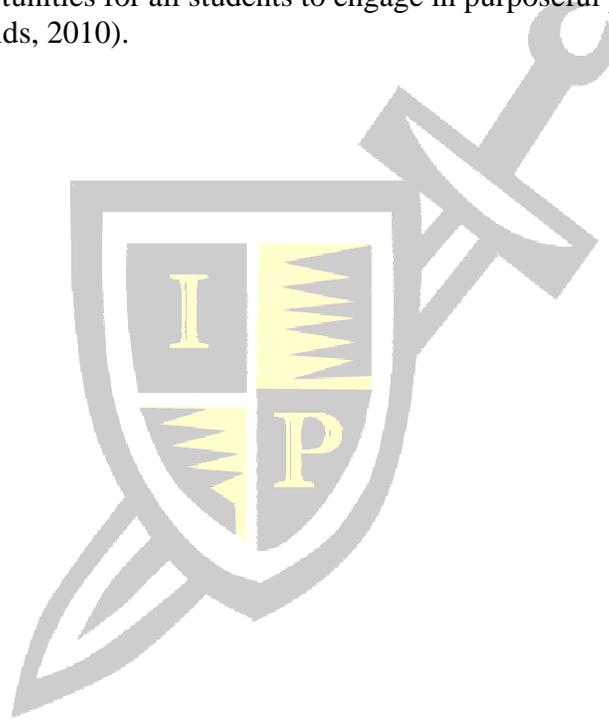
Significance to Social Change

Sharma and Monteiro (2016) postulated that education empowers individuals and thus, social change can be triggered. Social change will be achieved as the students' foundational skills in literacy and numeracy will cater to improved academic improvement across the curriculum. Further, Al-Haddad and Kotnour (2015) posited that change enablers in the education system encompass knowledge, skills, and competencies, intertwined with the capacity and capability of stakeholders. Based on Sharma and Monteiro, and Al-Haddad and Kotnour discussion on social change, this study will add value to principals' capacity and capability through the lens of the research participants as they have outlined their experiences leading strategic planning towards student achievement. The codes, categories, and themes identified from the data can be used by principals in low performing schools based on their context, thereby promoting the opportunity for positive social change in the education system.

CONCLUSION

This study addressed the gap in the literature specific to principals' experiences leading strategic planning for improvement in literacy and numeracy at the primary level. Fullan's (1983) change process theory offered essential theoretical knowledge to ground the study to the

purpose and research questions and added value to data collection, analysis, and interpretation of the results. After analysis of the experiences of the principals, the nine themes generated from the data highlighted that they promoted their schools as centers of excellence detailed in the in-depth strategies outlined to build the capacity and capability of teachers. Stakeholder involvement added value to the transformation of the schools to high performing schools. Every principal in the study promoted himself/herself as a leader of change with on-going responsibilities. Leadership of the dimensions, including the eight organizational factors, and the four process variables of Fullan's change process theory, served as the key factor in promoting the success of the eight high performing schools. This was achieved through management and sustainability of the literacy and numeracy systems and processes institutionalized with the students at the center of the learning cycle. The basis of transformative leadership is to reduce if not eliminate the deficit thinking and inequities in the education system towards the creation of new knowledge frameworks. This new knowledge framework will allow education leaders to lead by providing opportunities for all students to engage in purposeful pedagogies facilitated by high expectations (Shields, 2010).



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