

Strategic Planning in Education in Manitoba

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Abstract

Strategic planning began in the business world. Can it be applied in education? The first aim of this study was to review the strategic planning activities of school divisions within the boundaries of the City of Winnipeg to determine whether those activities corresponded in a general way to the strategic planning cycle recommended by John Bryson Cycle. A second aim of this study was to interview superintendents to obtain their evaluations of the planning process, their annual reports to the community, their reports to Manitoba Education Citizenship and Youth, and schools plans. Overall the study found that strategic planning is functioning quite well in the school divisions in Winnipeg. There is some variation in the processes used but this indicates the distinctive features of each of the six school divisions.

Introduction

Strategic planning began in the business world in the mid-1960s and “corporate leaders embraced it as ‘the one best way’ to devise and implement strategies that would enhance the competitiveness of each business unit” (Mintzberg, 1994, p. 107). Strategic planners were hired as specialists who could separate thinking from doing. The planning systems were expected to produce the best strategies as well as the instructions for carrying out those strategies so that managers could do things right and not make mistakes; however, not all planning has worked out that way (Mintzberg, 1994, p. 107). Mintzberg (1994) believes that in its true form strategic planning is not planning but rather programming; stating and elaborating on visions or strategies that already exist (p. 108). Bell (2002) disagrees and states that “strategic planning may be understood as an approach to establishing the long-term future of an organisation and then moving that organisation in an appropriate direction to achieve the future state to which its members...aspire” (p. 408). Mintzberg (1994) concludes that strategic planning has taught organizations about “how organizations function...how managers do and don’t cope with that functioning...and, how we think as human beings” (p. 114). Behn (1988) states that “strategic planning is an attractive concept, for it suggests that we know where we are going *and* that we have a clear notion of how we are going to get there” (p. 647). Many organizations both business and non-profit adopted strategic planning.

The information gathered by decision makers to develop strategic plans comes from a number of sources such as “long-term demographic and economic projections based on current trends and

foreseeable influences” (Howell, Williams & Lindsay, 2003, p.1), broad shifts in public opinion and the reputation (image) of the particular organization. Strategic planning should be about listening to stakeholders in the organization voice their concerns and suggestions for improvement, reviewing hard data from research in the organization, and synthesizing the information into a vision for the direction of the organization.

Duke (1999) agrees that “those with needs should have a voice in determining both the nature of their needs and the extent to which their needs are being met” (p. 21). Organizations themselves have both needs and wants of their own and how much credence they give to the needs of their stakeholders varies from one organization to another. Bryson (1995) defines a stakeholder “as any person, group, or organization that can place a claim on an organization’s attention, resources, or output or is affected by that output” (p. 27). The needs of stakeholders fit with the role of public organizations particularly the needs of students in schools. Mintzberg (1997) states: “planning documents can articulate lofty ideals, which...some people find helpful. But such documents can never specify the very difficult trade-offs that have to be managed constantly” (p. 153). Crandall, Eiseman and Seashore Louis (1986) conclude that “strategic planning should be sensitive both to *contingencies* and to very specific *local conditions*” (p. 45). Thus strategic planning needs to involve a number of players and follow processes that include stakeholder involvement (Behn, 1988; Duke, 1999; Crandall, Eiseman & Seashore Louis, 1986; Mintzberg, 1994; Young, Levin, & Wallin, 2007). It is interesting to note that Behn (1988) reports that “ironically, while government is becoming enchanted with strategic planning, business is becoming disillusioned with it” (p. 647). The infatuation with strategic planning for public service organizations has waned since the 1980s; nevertheless, some form of strategic planning still is practiced by educational organizations today.

In England, schools are involved in “school improvement planning, with its emphasis on the curriculum and the improvement of student attainment” (Bell, 2002, p. 412). With the demands today in education for accountability and measurable results in student achievement, driven in part by the *No Child Left Behind* legislation in the United States, as well as the changing demographics of the population with

attendant growth in diversity and student learning needs, there is need for effective planning in education. Fullan (2006) writes that *No Child Left Behind* “cannot succeed until there is a new understanding of the need for capacity building” (p. 89) which uses strategies to “increase the collective effectiveness of all levels of the system in developing and mobilizing knowledge, resources, and motivation, all of which are needed to raise the bar and close the gap of student learning across the system” (p. 88). Levin (2009) reported on using capacity building to reform Ontario’s school system. Levin and Fullan (2008) agree that “improvement lies in changing teaching and learning practices...this requires focused and sustained effort by all parts of the education system and its partners” (p. 291). Good planning with implementation strategies and measurable outcomes that includes stakeholder involvement and good communication will achieve this.

Even though some people might argue that what happens in the classroom is far more important than planning, effective planning definitely has an influence on what goes on in the classroom. Change is a characteristic of our society and the children in schools today come from a world very different from the one in which the adults in those schools today grew up. Schools are moving from the industrial age to developing learning organizations and cultures. McCune (1986) reports that the effectiveness of strategic planning in education is based on: “the leadership that backs the plan...the quality of the implementation plan, and the persistence in carrying out the plan” (p. 32). Also, the effectiveness of strategic planning in education is influenced by the nature of the challenges faced by the schools and the school divisions and the coalitions of support and opposition within the various stakeholder communities.

Young, Levin and Wallin (2007) describe stakeholders as having “a stake or interest in the enterprise of schooling” (p. 72). Many stakeholder groups, both internal and external, play an active role in education. Internal stakeholders include: associations of teachers, school trustees, school superintendents, school principals; unions, parents, community groups, and students while external stakeholders who do not have a main focus on education but who at times may have an interest in particular issues include: business organizations, the media, community groups and labour unions (Young, Levin & Wallin, 2007). Students have no formal political role in education and their input is often

overlooked and “where student involvement does exist, it is typically of a token nature, with little or no real influence on subsequent decisions” (Young, Levin & Wallin, 2007, p. 78). Does education need strategic planning?

Davies and Ellison (1998) believe that strategic plans for schools are not operational plans that have been extended for a year or two and that “operational plans need to be refocused to concentrate on explicit learning outcomes for pupils” (p. 472). They perceive strategic planning as “journey thinking in which we are extrapolating patterns from the past and projecting forward several years into the future” (Davies & Ellison, 1998, p. 462). The three areas of strategic planning according to Davies and Ellison (1998) are: *learning outcomes, the support for the quality of the leaning and teaching processes, and management arrangements* that support the learning outcomes and the teaching processes (p. 470). Strategic plans must have measurable outcomes that are SMART (specific, measurable, achievable, relevant and timed) (Davies & Ellison, 1998; Manitoba Education Citizenship and Youth, website, n. d.) and are referred to as SMART goals. When planning, schools should be building a futures perspective for the school, use strategic intent as well as strategic planning, and use operational target-setting (Davies & Ellison, 1998, p. 465). Strategic intent is described by Davies and Ellison (1998) as “setting key areas of achievement where precise articulation of detail is not possible. It forces the organisation to be imaginative and inventive in seeking new ways to create capability and to achieve goals” (p. 467). The strategic planning process addresses incremental and linear activities and tasks.

Reeves (2006) describes planning as “a new religion spreading like wildfire in school systems and state departments of education...its adherents believe that with just the right school improvement plan...the deity to whom they pray will grant educational miracles” (p. 61). Reeves (2006) calls this new religion “Documentarianism” and criticizes it by stating that “this devotion to plans and procedures not only destroys forests with its endless printed documents but... it also harms student achievement” (p. 62). Reeves (2006) is an advocate for improving student achievement and concludes that “when it comes to achievement and equity, planning and processes are less important than implementation, execution, and monitoring” (p. 62). In 2008, Reeves reiterated the importance of monitoring and evaluation of the

strategic plan. The researcher believes that good plans in education must include processes for implementation, execution, and monitoring. Fullan (2001) advocates for “enhanced student performance, increased capacity of teachers, greater involvement of parents and community members, engagement of students, ...and greater pride for all in the system” (p. 10). These can be achieved if the stakeholders are involved in the planning and goal setting process.

For educational leaders, how planning and educational change are implemented is very important and the system will be better off if change is brought about effectively (Preedy, Glatter and Wise, 2003, p. 195). On the other hand, poor planning and implementation result in children receiving less than they are entitled to and are a disservice to society. Who is responsible for overseeing the development of the plan and its implementation? Preedy, Glatter and Wise (2003) state that, “it is top management’s responsibility to do this and that top management leads the development of strategy in organizations” (p. 142). In education, top management would be the superintendents, senior management and school trustees who lead the development of the strategic plan. There are a number of models and processes available for strategic planning, most of which are more suitable for business (corporate) organizations. Schools differ from corporations and thus corporate models really do not fit schools (Evans 2007). For this study, a model applicable to public and non-profit organizations was chosen.

Bryson’s (1995) Strategy Change Cycle for strategic planning was developed for public and non-profit organizations. The Cycle includes ten steps to follow but does not include a process to ensure the steps are followed. Bryson’s ten step model was chosen for this study because it has been widely adopted by public and non-profit organizations and his book (now in its third edition) includes many “real world” examples. Bryson’s (1995) Cycle includes:

1. Initiate and agree upon a strategic planning process.
2. Identify organizational mandates.
3. Clarify organizational mission and values.
4. Assess the organization’s external and internal environments to identify strengths, weaknesses, opportunities, and threats.
5. Identify the strategic issues facing the organization.
6. Formulate strategies to manage these issues.
7. Review and adopt the strategic plan or plans.
8. Establish an effective organizational vision.

9. Develop an effective implementation process.
10. Reassess strategies and the strategic planning process. (p. 23)

This paper will determine whether the strategic planning activities of school divisions correspond in a general way to Bryson's ten steps listed above.

Goal development and implementation is part of strategic planning. Duke (1999) states: "goals represent public statements of organizational priorities" (p. 19). What are the goals and priorities that school divisions have developed? Are they specific, measurable, achievable, relevant and timed (SMART)? The answers to these questions will be presented further on in this paper.

One aim of this study was to review the strategic planning of school divisions to determine if the ten steps in Bryson's Cycle were included by school divisions. During this review, the extent of stakeholder involvement, inclusiveness in the process and how meaningful their participation was also were examined. Bryson (1995) states organizations should do a stakeholder analysis to determine "who its stakeholders are, what criteria they use to judge the organization, and how the organization is performing against those criteria" (p. 70). A stakeholder is an institution or actor which is significantly affected by or can strongly influence the fate of the school division. Stakeholders in education (within school divisions) would include students, parents, staff members, principals, senior administrators, school trustees, and the community within the school division. Strategic plans can vary in their process, format and content. Strategic plans should include: mission statements, goals, strategies for implementation, and indicators for success (Bryson 1995, Duke 1999). This study examined whether these factors have been applied in education in both the process and the final product (plan).

Manitoba Education, Citizenship and Youth (MECY) works in collaboration with school divisions, to meet the shared need to collect and utilize information for continuous improvement through the school plan reporting process which is on a three year reporting cycle (Manitoba Education, Citizenship and Youth [MECY], 2008, p. 1). The provincial government is also a stakeholder in a broad sense in education in the province. The researcher was interested in the process used to develop the reports, the goals the divisions are working on for the current year, and the similarities and differences

between the various divisions in the study. MECY requires school divisions to report annually to their communities. The researcher was interested in how the school divisions' annual reports to the community are developed, the format and content of the annual reports, and the similarities and differences in these reports between the six divisions in this study.

Purpose

The first purpose of this study was to review the strategic plans and the annual reports to the community for the six metro Winnipeg public school divisions to determine if the ten steps in Bryson's Cycle (1995) were applied, to determine if there was any stakeholder involvement and to review the final product (plan). An analysis of the similarities and differences in these reports was also conducted. The second purpose of this study was to review the processes used in the school divisions by interviewing one public school superintendent or assistant superintendent from each of the six metro Winnipeg school divisions to determine (a) the process each Division used to develop its strategic plan; (b) how each Division develops its annual report to the community; (c) how each Division develops its planning report for Manitoba Education Citizenship and Youth (MECY); and (d) what process each Division's schools use to develop their annual school plans. The community reports and school plans were also analyzed to determine the extent to which they align with the strategic plan. Research will determine the extent to which Bryson's Cycle has been applied by any of the school divisions in the study, and, what role was played by the leadership in the organizations.

Methodology

The study reviewed and analyzed the strategic plans, annual reports to the community and MECY, and school plans (products) for the six metro Winnipeg public school divisions¹ and the processes used to develop these plans and reports. One focus was on the product, which included the content of the strategic plans and the annual reports to the community, the similarities and differences in these plans and reports. The second focus was on the process used to develop these plans and reports and to determine the extent to which Bryson's (1995) Strategy Change Cycle had been applied. The results of the data analysis are reported as the first set of the findings of the study. Because the research questions for the second

purpose of this study are subjective and depend on the individual leadership experiences of those within the study, the methodology of choice was qualitative in nature.

In order to address the research questions, (a) the process each Division used to develop its strategic plan; (b) how each Division develops its annual report to the community; (c) how each Division develops its planning report for Manitoba Education Citizenship and Youth; and (d) what process each Division's schools use to develop their annual school plans, the superintendents/assistant superintendents (study subjects) of the six metro Winnipeg public school divisions were interviewed in person to obtain data related to their experiences and reflections on planning². Questions were asked on three fronts: (a) planning and reporting processes used by the Division centrally, (b) reporting procedures to Manitoba Citizenship and Youth, and (c) planning and reporting processes used by the Division's schools. All interviewees were asked to reflect on the processes used presently, those used in the past and those being contemplated for the future. The researcher is a former assistant superintendent who has a past professional association with the participants. Interviews took approximately one hour to conduct, were semi-structured and off the record. With the informed consent of the participants the interviews were tape-recorded and transcribed by the researcher. All transcripts were mailed to the participants for review to determine the accuracy and appropriateness of the text in the opinion of the respondents. The data from the interviews were transcribed, analyzed and interpreted by the researcher. Participants are not identified by their individual comments.

Findings and Discussion

Strategic Planning

The application of Bryson's Cycle (1995) to the six Metro Winnipeg school divisions (labeled A to E) resulted in a summary of the findings as shown in Table 1. None of the participants in the study was asked if they were aware of or used Bryson's cycle in the development of the strategic plan for their school division. Nevertheless, each of the division's strategic plans was reviewed by the researcher and assessed based on the ten steps in Bryson's cycle. The elaboration on the assessment of the school divisions' strategic plans using Bryson's cycle follows the summary of findings in Table 1 below.

Table 1. Bryson's Cycle (1995) applied to the six Metro Winnipeg School Divisions

Bryson's Cycle (1995)	A	B	C	D	E	F
1. Initiate and agree upon a strategic planning process.	✓	✓	✓	✓	✓	✓
2. Identify organizational mandates. ¹	n/a	n/a	n/a	n/a	n/a	n/a
3. Clarify organizational mission and values.	✓	✓	✓	✓	✓	✓
4. Assess the organization's external and internal environments to identify strengths, weaknesses, opportunities, and threats.	✓	✓	✓	✓	✓	✓
5. Identify the strategic issues facing the organization.	✓	✓	✓	✓	✓	✓
6. Formulate strategies to manage these issues.	✓	✓	✓	✓	✓	✓
7. Review and adopt the strategic plan or plans.	✓	✓	✓	✓	✓	✓
8. Establish an effective organizational vision.	✓	✓	✓	✓	✓	✓
9. Develop an effective implementation process.	✓	✓	✓	✓	✓	✓
10. Reassess strategies and the strategic planning process.	✓	✓	✓	✓	✓	✓

Note: 1. The organizational mandate for school divisions is provided in The Public Schools Act of Manitoba.

1. *Initiate and agree upon a strategic planning process.*

All of the school divisions in this study have a strategic planning process in place. Three of the divisions have been in existence for some time while the other three are a result of the amalgamation of school divisions which occurred in 2002 and thus developed strategic planning processes for the new divisions that may have differed from the processes used in the legacy divisions. Further discussion on the processes used by the six school divisions in this study will be reported on later in this paper.

2. *Identify organizational mandates.*

The mandates of school divisions are stated in The Public Schools Act of Manitoba in Section 41. The mandates have been interpreted and refined over time in response to changes in governments and official spokespersons of MECY. The mandates are determined by the legislature in which school divisions have no legal input. However, there have been consultations by school divisions with various government officials in the past.

3. *Clarify organizational mission and values.*

Bryson (1995) states that “mission...clarifies an organization’s purpose, or *why* it should be doing what it does; vision clarifies *what* the organization should look like and *how* it should behave as it fulfills its mission” (p. 67). A search of the websites of the six school divisions in this study found they all have mission statements and three of the six also had vision statements. The mission and vision statements of the school divisions in this study were clearly stated and the divisions’ values and/or belief statements were also on their websites. Manitoba Education Citizenship and Youth (MECY) published on its website the following as its objective: “the fundamental objective of the education system is to prepare learners for lifelong learning and citizenship in a democratic and sustainable society...to create more opportunities for learner success, especially for those least likely to succeed”. However, a further search of the MECY website (<http://www.edu.gov.mb.ca/k12/agenda/index.html>) by the researcher found no mission or vision statements for MECY. If the objective published on MECY’s website is its vision and/or mission statement it should be labeled as such to eliminate any ambiguity. Vision and mission statements serve a useful purpose and make it clear to the reader that the organization has a clear direction.

4. *Assess the organization’s external and internal environments to identify strengths, weaknesses, opportunities, and threats.*

Bryson (1995) believes that this step “allows the strategic planning team to see the organization as a whole in relation to its environment” (p. 86). At this stage, organizations assess their strengths, weaknesses, opportunities and threats commonly referred to as a SWOT analysis. All of the school divisions in this study did some form of an environmental scan (SWOT), both internal and external, prior to developing their strategic plans. These scans included focus groups, surveys, feedback from stakeholders, discussions, and reviews of the progress of the previous year’s priorities and action plans. The scans are not part of the published plans, but, information on the scans was obtained during the interviews conducted for this study.

5. *Identify the strategic issues facing the organization.*

Bryson (1995) stated that the strategic issues “are fundamental policy questions or critical challenges that affect an organization” (p. 30) and involve “what will be done, why it will be done, how it will be done, when it will be done, where it will be done, who will do it, and who will be favored or disadvantaged by it” (p. 104-105). Routine operational issues on the other hand are dealt with by the organization on a daily basis. Strategic issues arise out of the SWOT analysis and the stakeholder analysis. All of the school divisions in this study have developed priorities/goals, set action plans with timelines and who is responsible for various parts of the plan. According to its website, the six priorities of MECY developed in 2002 have been:

- Priority 1. Improving outcomes especially for less successful learners
- Priority 2. Strengthening links among schools, families and communities
- Priority 3. Strengthening school planning and reporting
- Priority 4. Improving professional learning opportunities for educators
- Priority 5. Strengthening pathways among secondary schools, post-secondary education and work
- Priority 6. Linking policy and practice to research and evidence

One of the school divisions in this study has three goals, two have four goals, two have five goals and one has six goals. The goals of the school divisions are multi-year goals, not goals that will be achieved in one year. All of the school divisions have goals related to MECY’s priorities 1, 2, 4, and 5 (available on their websites) even though their goals are not worded identically they do fit under the umbrella of MECY’s priorities. Although none of the school divisions had Priority 3. “Strengthen school planning and reporting” as a priority, all of the divisions are working with their schools on planning because divisions must report on their planning to MECY every three years.

All school divisions are engaged in research although it is not stated directly in their priorities/goals/strategic directions (MECY Priority 6. “Linking policy and practice to research and evidence”). Some school divisions have research departments that conduct the research while others have staff members with extensive research experience who do the research and data collection and interpretation. More and more classroom teachers are conducting action research in their classrooms and administrators are conducting research in their schools. The school divisions align their planning with the priorities of MECY. This was quite evident in the participant interviews when division

strategic plans and school plans were discussed. Further commentary on the planning process will be made later in this study.

The school divisions in this study also have goals concerning student assessment, student outcomes, finance and resource management, student behaviour, aboriginal education, pupil files and records management, and literacy. Once again, the wording of the goals is different but the topics are in common.

6. *Formulate strategies to manage these issues.*

Bryson (1995) writes that the purpose of strategy formulation is to develop strategies “in order to achieve goals or a vision of success” (p. 133). All of the school divisions in this study have developed strategies and action plans to achieve their goals/priorities/strategic directions. Two of the school divisions in this study have their action plans available on their websites.

7. *Review and adopt the strategic plan or plans.*

Bryson (1995) writes that the purpose of this step “is to gain an official decision to adopt and proceed with the strategies and plan prepared” (p. 145). Bryson (1995) goes on to state that “for the proposed plan to be adopted, it must address the issues key decision makers think are important with solutions that appear likely to work” (p. 145). All of the school divisions in this study review their strategic plans on an annual basis and the plans are adopted by their key decision makers, the individual school boards.

8. *Establish an effective organizational vision.*

Bryson (1995) writes that:

The vision should emphasize purposes, behavior, performance criteria, decision rules, and standards that serve the public rather than the organization...should include a promise that the organization will support its members' pursuit of the vision...should clarify the organization's direction and purpose; be relatively future oriented; reflect high ideals and challenging ambitions; and capture the organization's uniqueness and distinctive competence...and should also be relatively short and inspiring. (p. 156 -157)

This is no small undertaking! Bryson (1995) also states that a vision of success is “a description of what the organization will look like after it successfully implements its strategies and achieves its full potential” (p. 165).

As stated earlier, all of the school divisions in this study have mission statements and three of them also have vision statements. The three divisions without vision statements have combined the mission and vision statements into one statement which they have called a mission statement. The school divisions also have mottos/ slogans which are posted on their websites and used in their publications. In the opinion of the researcher, the six school divisions in this study have organizational visions that meet Bryson’s criteria.

9. *Develop an effective implementation process.*

Bryson (1995) indicates that it is not enough to just develop a plan but that “developing effective programs, projects, action plans, budgets, and implementation processes will bring life to the strategies and create real value for the organization...and its stakeholders” (p. 166). Bryson (1995) goes on to say that “implementation must be consciously, deliberately and strategically planned, managed, and budgeted” (p. 186). Strategic planning literature frequently reports that the primary weakness of the strategic planning process is implementation. However, this is not the case in education. All of the school divisions in this study have developed an implementation process for their strategic plans which includes measurable outcomes (SMART). Resource management (financial and human) is considered as the plan is developed. The school divisions’ strategic plans are referred to and reviewed a number of times during the school year and interim progress reports are reviewed by the superintendents of the school divisions.

10. *Reassess strategies and the strategic planning process.*

During the review processes and interim progress reports, strategies are reassessed and changed or abandoned if necessary. Sometimes emergent issues take precedence and some goals have to be set aside for that year although this does not happen very often. These would be reassessed in the next year.

The strategic plans of the six school divisions in this study were reviewed. The plans varied in format and design. However, all of the plans contained goals/priorities/strategic directions for the current year and action plans to implement them. Two of the plans published on the divisions' websites contained all of the details of the plan including who was responsible for overseeing the implementation of the specific goals and what strategies and/or activities were going to be used to achieve the goals.

When asked about planning and priorities and why they are important, one participant stated: "As a School Division we have been developing priorities for the work of the Division for many many years. Those priorities in terms of the planning process help us when we are doing our budgeting. The idea would be that the plans, the finances and the processes that come out of that are actually connected together. There is a moving forward so that hopefully people across the Division understand who we are, where we are going and what we are trying to accomplish". Thus strategic planning is not new to education as it has been going on in various forms for many years.

Strategic Planning Process

The findings from the interviews of the superintendent or assistant superintendent of each of the six school divisions in this study on the strategic planning process are summarized in Table 2. School board members (trustees) are participants in the strategic planning process in all school divisions in this study. One school division in this study has a consultant on staff who oversees both divisional and school planning. Another school division has an assistant superintendent who has planning as part of the position's portfolio.

Four of the school divisions in this study use a number of stakeholder groups in the development of their plans while the others use fewer stakeholder groups as seen in Table 2. One school division sought input from all of the stakeholder groups. One participant interviewed stated "we also do plan with some reference to the trustees' election cycle. They need to be masters of the plan and their outlook if they are freshly elected is different than the June before the next election". Another participant said: "Now the development of the plan is more of a Board/Senior Admin consultative

collaborative effort in order to hear from the trustees what they are hearing in the community and what their concerns as a group are”.

Table 2. Responses to Questions on the Strategic Planning Process

Strategic Planning Process in the Division	A	B	C	D	E	F
1. a. Who was involved in its development?						
School Board	✓	✓	✓	✓	✓	✓
Supt. Team ¹	✓	✓	✓	✓	✓	✓
Administrators ²	✓	✓	✓	✓	✓	✓
Staff Members	✓					✓
Parents/PACs ³	✓			✓	✓	✓
Community Members ⁴	✓			✓	✓	✓
Students				✓		✓
1. b. What process was used to develop it?						
Board Retreat	✓		✓	✓	✓	✓
Meetings over the year		✓				
1. c. When was it developed?	2004-05 ⁵	2004-05 ⁶	2006	2006-07	2008	2005
1. d. When was it reviewed/ revised?						
Annually	✓	✓	✓	✓	✓	✓
2. Who has had major responsibility for its design and implementation?						
Superintendent and/or Assistant Superintendent	✓	✓	✓	✓	✓	✓
3. How is the plan used?						
as a general guide	✓	✓	✓	✓	✓	✓
in school planning	✓	✓	✓	✓	✓	✓
4. Under what circumstances or for what issues is the plan normally referred to in making decisions?						
in budget development	✓	✓	✓	✓	n/a ⁷	✓
when developing policy	✓					✓
when making decisions	✓			✓		✓
5. What role does the school board play in developing the Division’s plan?						
involved	✓	✓	✓	✓	✓	✓
supportive	✓	✓	✓	✓	✓	✓
final approval of the plan	✓	✓	✓	✓	✓	✓

Notes:

1. Superintendent's team includes superintendents, assistant superintendents and senior administrators at the Board Office.
2. Administrators include school-based administrators: principals and vice principals.
3. PACS are Parent Advisory Committees or Parent Councils.
4. Community members are non-parents and include businesses.
5. This was developed as a five year strategic plan. A new one is being developed for 2010.
6. This was developed as a three year strategic plan. A new one is being developed for 2009-2010.
7. The plan is not used in a formal way when the budget is developed.

Two of the school divisions in the study have used an outside consultant/facilitator to assist them in the development of their strategic plans while four of the school divisions have developed an annual planning cycle which they use in the development of their plans. Five of the school divisions have a retreat with their school boards to review and revise the strategic plan. Board retreats were recommended by Eadie (2008) who stated that retreats allow school boards the “opportunity to exert creative, proactive influence in the ...change process” (p. 40). All of the school divisions in this study have strategic plans that are for more than one year because school trustees and superintendents understand that most priorities cannot be achieved in one school year (ten months), thus divisions are looking at multi-year plans.

Three of the school divisions were amalgamated in 2002 and had to develop new processes for developing their strategic plans. One of the participants interviewed commented: “because amalgamation afforded a unique opportunity to start from the ground up, review what the legacy school divisions had been doing, and then talk about how programs would be harmonized, and what required review. After the initial stages of creating an amalgamated entity occurred...the community consultation process was used to begin the first strategic plan, to give it shape and form. This was such a natural reason to draw in community and to ask what matters to you.” As time goes on and people become ever busier in their lives, school divisions have to come up with more creative ways of engaging the community to assist in developing the strategic plans.

All of the school divisions in this study review their plans on an annual basis and develop action plans for the next year. The strategic plans and their priorities are for more than one year and the people in the school divisions understand that most goals take longer than ten months to achieve. One participant interviewed commented: “I think that one of our strengths is the goal posts don’t change a lot. People feel they are not going to take risks and put themselves out if things keep changing. I’m sure they will just say I will continue to do my own thing and I’m not going to get committed to this direction if you’re going to change it on me all of the time”. All participants agreed that gone are the days when every year there was something new and if one didn’t buy in well you knew that it was going to go away so you just

ignored it. With the move to more accountability and measurement of progress in education you can't do that any more.

The wording of the strategic plan is important. One participant commented: "I think part of the "strategic" in strategic planning is that you're consciously thinking all of the time about how you are presenting this...with some awareness of the impact of the language on constituents and you conceptualize that framework for people so that they at least start to say, I see what you mean by this". By consistently giving constituents the information about the plan and goals and using the same wording (language), people begin to understand what the school division is doing, why it is doing what it is doing, and the progress being made.

The major responsibility, in all of the school divisions in this study, for the design and implementation of the strategic plans is with the superintendents and assistant superintendents. One participant put it this way: "responsibility in the largest sense would be members of the superintendent's team whose role it is to do the monitoring, the pace-setting, and, the communication with each other". Although the school boards participate in the discussions, the drafting of the plan for board approval is done by the superintendents and assistant superintendents.

School divisions in this study used their plans as a general guide for the year and for planning at the school level. One participant commented: "Each year as the plan has been developed, the outcomes have gone from more general to more specific, from what the division needs to do; to what the administrators need to do with their school staff; and now what are the teacher goals and how do they link to the plan". Another participant commented: "it's been a change in people's thinking overall to a more elongated sort of timeline and people are actually saying I feel so much better. For whatever reason as educators we had that notion that one year was all we could use and if we didn't have it done there was something wrong with us and we were on to the next thing. It has been a positive evolution in our existence". The priorities of MECY are considered by school divisions when they develop their plans and the priorities of MECY and the school divisions are considered by the schools when they develop their plans.

In five of the six school divisions in this study the strategic plan is used when the budget is developed. The sixth division indicated that the plan is not used in a formal way when the budget is being developed. Some goals require extensive resources (time, money and staff) and their budgetary implications are considered when the divisions develop their budgets. Some goals can be aligned with available resources with no increase in the budget. The point being that strategic planning and budget development need to work together in order for the school division to function effectively. One participant indicated that it took awhile to connect budget development with strategic planning but one cannot function effectively without the other. Two of the school divisions use the plan when policies are being developed and three of the divisions use the plan to inform their decision making. The researcher believes that the strategic plans, particularly the mission and visions statements, guide the actions of all of the school divisions even though this was not articulated by the participants in all of the interviews. Based on the researcher's personal experience, the mission and vision statements are referred to on a regular basis. One participant commented: "I believe the Board and Senior Administration look to the values and belief statements of the Division when they are making their decisions and also expect the schools will use those as a guide when they are making decisions. As well, when we are setting policy or when we are taking a look at new research and trying to implement some of the ideas and some of the new things that come out we refer to the plan". Another participant stated that questions are asked while decisions are being made: "Are we on par with where we thought we would be? Are we encountering road blocks that we didn't think we would? Is there some research to be done? Are we going to have to stop this because maybe there's not enough information, and maybe it will have to be deferred to next year?" A third participant stated: "We always had policy on special education but we're looking at reviewing our policy to bring our policy up to date with what now is apparent through the kind of work we have done on special needs because it's a priority". Therefore the strategic plan actually affects policy development as well as decision making.

All of the school divisions in this study reported that the school boards were involved in the planning process, were supportive of the process and gave final approval of the plan. Some school boards

are involved at the beginning of the process, some in the middle of the process, but, all are involved at the end of the process. One participant stated: “when we bring the plan to them they have the opportunity to ask questions and reflect on it. They have been highly supportive of these directions. They in many ways allow us to do the work, they are seeing it as appropriate and they are also seeing it as being positive. They are highly supportive and willing to make decisions that will allow us to support the Division’s initiatives”. The strategic plans of the school divisions represent a form of anticipatory accountability outward to the community.

Annual Reports to the Community

All of the school divisions in this study had developed annual reports to the community as required by MECY. These reports were based on the strategic plans developed by the school divisions and provide a retrospective accountability of the progress of the school division on its plan for the previous year. The annual reports varied in format, design and content. Two of the school divisions produced annual reports which commented on each of their goals and were printed in multi-colored booklet format and were printed on glossy paper. One school division produced a newspaper style annual report that reported on each of its goals and was printed in two colours on newsprint. One school division reported on each of its goals and printed its annual report in booklet format on white paper in two colours. One school division produced its annual report in booklet format on white paper that was printed in two colours, was issued five times during the school year, and reported obliquely on its goals. The sixth school division produced a report to the community that was printed on white paper with black ink in booklet format that was issued a number of times a year rather than once, and reported on the goals in an indirect manner. All of the school divisions used pictures, mainly of children, in their annual reports to the community. Thus there was quite a lot of variation both in product and content in the actual annual reports to the community.

The findings from the interviews of the superintendent or assistant superintendent of each of the six school divisions in this study on the annual reports to the community are summarized in Table 3. There is consistency amongst the school divisions in this study on who is responsible for the preparation

of the Annual Report to the Community and the process used to prepare the report (Table 3).

Table 3. Responses to Questions on the Annual Report to the Community

Annual Report to the Community	A	B	C	D	E	F
1. a. Who is responsible for preparing the Annual Report to the Community? Superintendent and/or Assistant Superintendent	✓	✓	✓	✓	✓	✓
1. b. What is the process used to prepare Division’s annual report to the community. consultation and collaboration	✓	✓	✓	✓	✓	✓
2. How is the Annual Report made available to your community? distributed to all homes in the school division	✓		✓	✓	✓	✓
division's website	✓	✓		✓	✓	✓
all schools	✓	✓	✓	✓		✓
parent councils/advisory committees		✓		✓		✓
sites in the community		✓				✓
MLAs, MPs, Chambers of Commerce				✓		
3. What feedback have you received from the community on your Annual Report? very little	✓	✓	✓	✓	✓	✓
4. What mechanisms has the division instituted to gather feedback from the community? website	✓	✓	✓	✓	✓	✓
surveys	✓	✓			✓	✓
community forums/focus groups		✓				✓
data from current students			✓			✓

There is variation in how the Annual Report is made available to the community in the school divisions in this study. Not all school divisions distribute the report to every home in their school divisions and not all divisions post the Annual Report on their websites. When asked why the Report is not sent to all homes in the community, cost was given as a factor. However, school divisions all have newsletters that are sent a few times a year to every home in their communities in which the Report could be included. More and more taxpayers do not have children in school and thus would benefit from the information. One participant commented: “It’s our view that education is not just a school’s undertaking or parents’ but every resident has a part in it and they need to see that our kids are well educated and that we are making progress. That would be why we send it out. We are accountable to parents for their kid but I think we are accountable to the community generally for what we do with all of the kids”.

Very little formal feedback is received by school divisions in this study on their strategic plans. Positive word of mouth comments are received though by trustees, administrators and teachers on how the divisions are doing. One participant commented: “We try to highlight different things each year and move the spotlight around. We’ll tell stories from schools this year but they will be different schools than we highlighted last year”. Another participant commented: “I think we know that most people feel that their community schools are doing what they want them to do. They are content with that, they are happy with that”. All of the participants interpreted little formal feedback as positive support from the community for the endeavours of the school divisions.

Four of the six school divisions use surveys to gather feedback from their stakeholder groups. One participant commented: “We do survey parents ... on a whole myriad of questions to do with how they view the schools and what are the issues they think the Division should be addressing... On specific issues we have surveyed staff... We survey students as they leave grade twelve”. The feedback from the surveys provides valuable information to the school divisions on their progress and also provides them with input for the development of priorities.

One school division has advisory committees at the division level for parents, the community and students which provide valuable feedback to the school division as well.

Reports to Manitoba Education Citizenship and Youth

School divisions are required to report to MECY every three years on their plans and their outcomes thus providing retrospective accountability to the Provincial Government. Representatives of MECY meet with members of the superintendent’s department to discuss the school division’s report. The representatives of MECY have varied backgrounds, some have limited backgrounds in education, and some have been seconded to MECY for the meetings. Much of the discussion at these meetings centres on the categorical grants expenditures which form a small part of the school division’s expenditures rather than on the division’s priorities and student learning outcomes. The findings from the interviews of the superintendent or assistant superintendent of each of the six school divisions in this study on the Reports to Manitoba Education Citizenship and Youth (MECY) are summarized in Table 4.

Table 4. Responses to Questions on the Reports to MECY

Report to Manitoba Education Citizenship and Youth (MECY)	A	B	C	D	E	F
1. Who is responsible for preparing your planning report for MECY? Superintendent and/or Assistant Superintendent	✓	✓	✓	✓	✓	✓
2. What processes are used to prepare the report? consultation and collaboration	✓	✓	✓	✓	✓	✓
3. What feedback have you received from MECY on your planning report?						
minimal	✓	✓	✓	✓	✓	✓
verbal and written	✓	✓	✓	✓	✓	✓

There was no variation in how the school divisions in this study responded to the questions concerning the Reports to Manitoba Education Citizenship and Youth (Table 4). However, all participants had comments on the process MECY was using in its review of the divisions' reports. As reported earlier, school divisions are required to report every three years to MECY. The three year cycle began in 2007-08 and at the time of writing the report on this study, this is the second year of the first cycle. One participant reported that the feedback received from MECY was " cursory". One participant commented: "We've had some anecdotal feedback from MECY suggesting that we are doing a fairly good job of reporting. Based on what I have heard from other school divisions, I believe there is a little bit of a disconnect between what MECY sees as high priority and what the divisions see as high priorities. Hopefully during year three there will be a more coherent and more congruent discussions with MECY as the cycle progresses". Another commented: "We did receive some written feedback but we found for the most part it was a summary of the conversation. When it came to whether there were some things for us to really think about, consider, plan differently, there was not evidence of that in the responses that we got back. In the future, if the same people come out to the divisions, they will have a lot more information than they did in the first round of the cycle and I think the conversations will be quite different". A third participant commented: "The discussion is not on the analysis of the plans it is really on the categorical grants where they do more analysis". A fourth participant commented: "essentially MECY had their own agenda and when they said they were coming to listen, they actually came to talk. The feedback from them on the planning process was minimal and we'll see what happens the next time in the cycle that we have to

report. It strikes me that it was not a particularly pivotal moment in our division's life when we had those meetings with MECY".

It is obvious from the comments of these participants that they didn't feel that the discussions with MECY on planning were very meaningful. However, a number of participants are hoping that the second time through the cycle they will be. One participant commented: "The province although it still has those six priorities, has been very respectful, having articulated those priorities, that they too have maintained them. We don't see flavour of the year from them and I think that's a really good message. When you now report comprehensively only every three years, that is another factor that really helps emphasize for your community that this is not something that gets wrapped up in a bow every ten months. And it is permission giving. I think it's the single most helpful thing the province has done around planning. It's not that it's the only helpful thing but it is the single biggest good development that this is a process and not an event".

Another participant commented: "I think our hope would be that the Province in this three year cycle would be looking at the bigger picture and how do they fit into the bigger picture because a lot of what we are doing are areas that the Province has mandated. Whether it is as clear cut as the physical education or whether it is the huge job of Bill 13, accommodating every student in the best environment possible, it is great that the Province provides some leadership in these areas but along with their leadership comes a huge responsibility to support us, to guide us, to fund us to some degree and help us manage how to do this appropriately and consistently across the Province". Participants remain optimistic that the next round of discussions with the Province will be more meaningful.

Annual School Plans

Schools are required to report to MECY every three years on their school plans and outcomes. Some schools develop three-year plans and update them annually. Some schools develop annual plans. All of the school divisions have their schools submit their plans annually to the division. Schools get used to planning annually and don't perceive planning as something that is done only once every three years when the division has to report to MECY. Planning is a continuous process that facilitates dialogue at the

school level and this is of real value in the planning process. The findings from the interviews of the superintendent or assistant superintendent of each of the six school divisions in this study on the Annual School Plans are summarized in Table 5.

Table 5. Responses to Questions on the Annual School Plans

Annual School Plans	A	B	C	D	E	F
1. Who is responsible for developing the annual school plans in your Division? principal	✓	✓	✓	✓	✓	✓
2. a. What process is used to develop these plans? consultative collaborative	✓	✓	✓	✓	✓	✓
2. b. Who is involved in this process? school based administrators	✓	✓	✓	✓	✓	✓
school based staff	✓	✓	✓	✓	✓	✓
parents/parent councils/advisory committees	✓	✓	✓			✓
students	✓	✓	✓	✓		✓
3. How does the division ensure that school plans align with the divisional plan? reviewed by superintendents and/or assistant superintendents	✓	✓	✓	✓	✓	✓
4. a. Who provides feedback to the schools on their annual plans? superintendents and/or assistant superintendents	✓	✓	✓	✓	✓	✓
4. b. How is this feedback provided? in person conversations	✓	✓	✓	✓	✓	✓

Note: The involvement of students was usually at the middle and high school levels.

There was very little variation in how school divisions in this study dealt with school plans other than in the involvement of stakeholders (Table 5). All participants agreed that student voice was important and was being worked on. One participant commented: “Students can ask questions and offer a suggestion online. It’s anonymous. All of our schools have structures to get feedback. That’s an ongoing online feedback loop into the schools, high schools and middle schools”. Another participant commented: “High schools involve students very explicitly in their planning. If and when elementary schools involve students it’s more apt to be around consultations on specific kinds of things, assessment and evaluation reporting, motivational practices, code of conduct”.

One participant comment on the school and its plan: “We have a liaison structure. So when the school plan comes in it is not a surprise. We are working with the schools. We know what they have going on. The plan as I see it is a snapshot of an ongoing process of work and organizational development

rather than a starting point. If there is a school where there is active professional development, where there's inquiry, and strong professional conversations, they have no trouble generating a really good school plan. If you have a school where everybody is doing their own thing and they are not together on anything, they have real trouble coming up with a school plan that has any weight to it. If you have a rich professional conversation you have a good school plan, if you don't then you don't". Another participant summed up school planning: "The school plan is just one document; it's a piece of paper. What actually happens in the schools is significantly more important than what's on the piece of paper that is submitted to us and to MECY".

Schools have been developing plans for a number of years. One participant commented: "Because it is an ongoing process, the schools are fully aware now because they have been doing it for quite a few years, that when they do develop or when they initially developed and as they tweak their plans they have to be sure that in those plans they are commenting on the Division's priorities. Our expectation is that the Division's priorities are reflected in the schools' priorities but the way they are reflected could look different. They will have other things as well that they want to do".

Participants had some general comments regarding strategic planning. One participant commented: "It really is a never ending process. You're always planning and revisiting and then you're doing it again so I think it's very dynamic. I think the whole planning process is valuable particularly if you're planning and using what I believe are the core values and beliefs of the division to support whatever you are doing. As a school division we have certain values and beliefs and when we make decisions we need to use those as our guide posts". Another participant commented: "Within a division you've got a number of different planning structures that almost reside just outside of your plan. I know my operations person has a plan for building replacement and painting schedules. I know my transportation person has a plan for bus replacements. A lot of these plans are for ten years. It starts to become part of your skill set, for us it is part of everybody's skill set. It is integrated into the ongoing life of the schools rather than everybody being at the starting line and you fire the gun. The strategic plan, which is a business structure, doesn't fit with the ecology of the school system which is not at its heart a

business”.

Sometimes a model developed for businesses does not fit with the ethos of a non-profit organization. The school system is not an organization that makes money by selling a product, thus it is not a business. It does, however, concern itself with student outcomes and preparing students to be responsible democratic citizens. Another participant stated that the first strategic plan developed in that school division followed a business model. But, the strategic plan being developed now “will be more about how does this impact on students. One of my pet peeves with the previous strategic plan was the fact that it was very business like and it really wasn’t student outcome focused. This strategic plan is going to have a more child centered flavour. And it’s going to reflect more of the world we work in and it will fit a little better”.

One other participant commented on the importance of the planning cycle: “planning isn’t an isolated area that you just sit down and say I have to develop a plan today. It’s crystal clear. It’s part of planning, delivering, getting the evidence. It’s a cycle and ... we need to plan our next steps based on the evidence, the data we have already received so that everything is connected. That’s what it should be for all of our plans, we evolve as we get more information and we take the next step”.

One participant summed planning up this way: “Planning is important, but it’s not nearly as important as the passion for kids and the passion for learning and the relationships that we build every day in the school division. We feel very strongly about that. We plan well. But, quite honestly this planning document doesn’t hold us to account. It’s the kids in the classroom that do”.

Conclusions and Recommendations

Both of the purposes of this study have been accomplished, the products of planning and the planning process itself have been reviewed. Strategic planning is functioning quite well in the six school divisions in Winnipeg. There is some variation in the processes used and the products produced but given the uniqueness of the school divisions this is to be expected. All of the school divisions in the study have the education of children as their main focus. Real change and improvements happen at all levels of the organization (classroom, school, division and province) when goals and plans have measurable outcomes

(SMART). The researcher has seen the change in the system from developing goals that were fairly general to what is happening now in school divisions – goals are developed that have SMART outcomes and these outcomes affect the learning of students. Based on this study and the researcher's decades of professional experience it can be said that the planning process of school divisions provides them with opportunities to read their environments with high degrees of accuracy, to set directions, to define success, and to measure progress. Therefore, planning matters and real change and improvements are happening.

Bryson's (1995) Strategy Change Cycle has been applied to all of the strategic plans of the school divisions in this study. There were no apparent gaps in their planning when the Cycle was applied. Although this Cycle was developed over nineteen years ago, it appears to be relevant for school divisions today.

The researcher recommends that one area of planning where school divisions could improve is in involving more stakeholders in the development of their strategic plans, particularly students. The key to success for school divisions is the satisfaction of key stakeholders (Bryson, 1995; Duke, 1999). School divisions and schools need to include more student voice when they are developing their plans. Since students are the primary stakeholders in the school divisions and are impacted the most by the actions of the school boards, a forum needs to be provided for their voices to be heard. The forum could include surveys, focus groups, advisory committees to the school board, and/or advisory committees to school principals. Some divisions are already doing this and are to be commended for their actions. The researcher also recommends that school divisions attempt to involve more community members (who are not parents) when strategic plans are developed. These taxpayers, who do not have children in the school system, do have valid opinions on the progress of the school divisions and would provide a further opportunity for school divisions to read their environment. The involvement could be accomplished through forums, personal invitations to share perceptions, meeting with local business owners, and/or meeting with seniors through the local seniors organizations. The researcher realizes that this may be a challenge for school divisions but believes that it is a challenge well worth meeting.

The researcher recommends that school divisions, prior to the beginning of the next cycle of meetings, sit down in a face to face meeting with the Deputy Minister of Education to discuss their concerns regarding process and the feedback, or rather lack there of, that they have received on their planning. Discussing the process and providing examples of what meaningful feedback looks like would assist in enhancing the reporting process. The researcher believes that both parties would benefit from the discourse.

The results of this study would provide a basis for further investigation of planning in all school divisions in Manitoba. A much larger study could be undertaken to compare planning in education in Manitoba with planning in other provinces.

Notes

1. The six metro Winnipeg school divisions were: Louis Riel School Division, Pembina Trails School Division, River East Transcona School Division, St. James-Assiniboia School Division, Seven Oaks School Division, and the Winnipeg School Division.
2. This study received human ethics approval from the Education/Nursing Research Ethics Board of the University of Manitoba. All privacy and confidentiality protocols were followed.

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