

# Design a System to Monitor the Implementation of the Law on Inclusive Education in Portugal

Final Report

• **SRSP** •

Structural Reform  
Support Programme



Implemented by:



**EUROPEAN AGENCY**  
for Special Needs and Inclusive Education



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# **DESENHO DE UM SISTEMA DE MONITORIZAÇÃO DA IMPLEMENTAÇÃO DO REGIME JURÍDICO DA EDUCAÇÃO INCLUSIVA EM PORTUGAL**

## **DESIGN A SYSTEM TO MONITOR THE IMPLEMENTATION OF THE LAW ON INCLUSIVE EDUCATION IN PORTUGAL**

### **Final Report**

**This document was produced with the financial assistance of the European Union.  
The views expressed herein can in no way be taken to reflect the official opinion of the  
European Union.**



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The report has been developed as a result of the work conducted from June 2020 till June 2022 by a team of staff and consultants from the European Agency for Special Needs and Inclusive Education (the Agency).

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- the respondents to the online interviews;
- the 16 school clusters involved in the online survey;
- the teams organising, hosting and participating in the nine fieldwork activities: focus groups and school visits;
- the country experts from Norway and Estonia.

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## ABBREVIATIONS

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Abbreviations used in this report.

<b>Abbreviation</b>	<b>In full</b>
ANQEP	National Agency for Qualification and Education and Vocational Training
CONFAP	National Parents' Association National Confederation
CPD	continuous professional development
CRI	Resource Centres for Inclusion
DGE	Directorate General for Education
DGEEC	Directorate General for Education and Science Statistics
DGEstE	Directorate General for Schools
EMAEI	multi-disciplinary teams
HR	human resources
IGEC	Inspectorate General for Education and Science
ITE	initial teacher education
Law 54	Decree-Law 54/2018
UDL	Universal Design for Learning



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## INTRODUCTION

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The Ministry of Education of Portugal has taken the commitment to design a monitoring system that will allow for a preliminary assessment of the effectiveness of the Decree-Law 54/2018 (referred to throughout as ‘Law 54’) by the end of 2020, two years after the start of its implementation.

The new law to promote inclusiveness in school education in Portugal grants schools and teachers with higher autonomy to adapt their programmes to reach a higher degree of inclusiveness. This autonomy also implies the obligation to set a monitoring system with clear indicators to assess the level of implementation and effectiveness of their plans in promoting inclusion.

To achieve this ambitious goal, in October 2019 the Ministry requested the support of the Structural Reform Support Service (today, DG REFORM) from the European Commission. The request was approved (Reform/GA2020/011) and led to the current Action, which has been implemented by the European Agency for Special Needs and Inclusive Education.

The Agency has selected for this task a methodology based on standards. The standards-based model permits the comparison of existing educational provision and/or practice with desired standards identified by all educational stakeholders.

More detailed information on the methodology applied can be found in the next chapter.

The report presents the result achieved: the design of a system to monitor the implementation of the Portuguese law on inclusive education (Law 54). Results of the cross analysis of all activities conducted are also presented as well as the separate analysis of all activities: individual interviews, online survey and fieldwork.

The report finalises with some conclusions, to be considered as final concluding comments addressed to the Ministry of Education.

The pandemic has been ‘accompanying’ the entire activity, impeding in-person meetings, postponing the planned fieldwork and, as a result, limiting the number of school clusters visits planned from 16 to 9.

We are aware how busy and challenging a time we were all facing. We are grateful for the relevant information we have been able to collect since the beginning of the activity in spring 2020 till now.



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## EXECUTIVE SUMMARY

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The report presents the work conducted by the Agency to provide the Portuguese Ministry of Education with a system to monitor the implementation of the Decree-Law 54/2018 on inclusive education.

The methodology, based on a standards-based model, has permitted the comparison of existing educational provision and/or practice with desired standards identified by all educational stakeholders.

As a result, a monitoring system is provided where six standards and eleven indicators have been identified.

Standards and indicators have been validated by the use of well-known working tools: individual interviews of decision-makers and key stakeholders, an online survey addressed to directors, co-ordinators and those responsible for support services from 16 school clusters, and a fieldwork conducted with 9 school clusters. The fieldwork has comprised school visits and focus groups with directors, co-ordinators, education and non-education staff, as well as parents and learners. Results of these activities are extensively presented in the report.

Activities have permitted an overview of the perception, as well as the implementation, of the key areas of the law by the different participants.

Inclusive education is well known, its values are shared by all participating professionals. Professionals from school clusters are highly committed to implement an inclusive educational system.

Although resources and support measures are well known, some differences appear among decision-makers and professionals from the field concerning the need and provision of resources and the education strategies to implement the required support measures. This is also true among different school clusters.

The law pays special attention to parents' and learners' involvement. The process to involve parents is on the right track; much more attention and emphasis, however, needs to be placed upon learners' involvement.

Professional development is very much valued by schools, with great emphasis on in-service options. The most appreciated way to 'learn' seems to be among colleagues from the school or from other schools.

Schools are engaged in supporting all learners to reach their full potential. Nevertheless, more attention needs to be paid to what an inclusive education means and what is required to respond to all learners, without any learner left behind. There are also important reflections concerning what school success means: too much emphasis is being given to academic outcomes, neglecting social outcomes that should be considered.





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## I – METHODOLOGY

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The Agency used a standards-based methodology to provide the Portuguese Ministry of Education with a monitoring system that includes standards and an accompanying set of indicators, as well as guiding questions to promote reflection and exploration.

The standards-based model allows a comparison of existing educational provision and/or practice with the desired standards identified by all educational stakeholders.

This model requires a number of well-defined and interconnected steps to be put in place, as presented during an online workshop in April 2020:

- The identification of **standards**. Standards are aspirational statements for the educational system, identified by stakeholders: *What do we wish to achieve with our educational system?* Six standards have been identified.
- The identification of a set of **indicators**. Indicators are considered as parameters (or measures) that determine the performance of inputs, processes and outcomes. They show what needs to be measured more precisely for each standard. Eleven indicators have been identified, focused on the existence and performance of required mechanisms and provisions that enable the implementation of existing legislation: *What inputs and processes do we want to ‘measure’ in each standard?*
- The identification of **questions** to validate the standards and find the existence or absence of the indicator(s): *How can we find out which inputs and processes are in place and to what extent?* Nineteen core questions have been identified. They have been adapted according to the instrument used (open questions with individual interviews and focus groups; closed questions using an ‘agree-disagree’ format for the survey) as well as to whom it is addressed (national/local authorities; support services’ representatives; schools; parents; learners). Due to the pandemic, a question regarding its impact has been added.

The stakeholder-based process was used to create and validate a set of standards that are grounded in Portugal’s system of inclusion policy goals and represent aspirational statements for the educational system.

Standards-based monitoring involves:

1. Defining and validating standards
2. Collecting data to measure policy and practice against those standards
3. Reviewing data
4. Implementing changes to improve policy and practice according to the standards.

In this report we describe the methodology used to define and validate standards. Table 1 contains a timeline for the development and validation process.



**Table 1. SRSP Standards Development and Validation Timeline**

<b>Activity</b>	<b>Timeline</b>
1.1 Document/Desk Review	June–July 2020
1.2. Draft Framework Development	July–September 2020
1.3. Country Comparisons: Estonia and Norway	September–December 2020
1.4. Draft Standards Framework Application	January–April 2021
1.5. Interviews with Key Decision-Makers	May–July 2021
1.6. Survey Development, Deployment and Analysis	May–November 2021
1.7. Survey and Interview Cross-Source Analysis	July–December 2021
1.8. School Visit Planning and Fieldwork	July 2021–April 2022
1.9. Integrated Analysis and Reporting	April–July 2022

### **1.1 Document/Desk Review**

The process began in June 2020, with a desk review of Law 54 and other relevant Portuguese and European documents by Agency staff to identify key elements of the law. On 7 July 2020, the First Technical Meeting was held between Agency staff and Portuguese representatives from different ministerial education departments:

- Directorate General for Education (DGE);
- Cabinet of the Secretary of State for Education;
- Directorate General for Schools (DGEstE);
- Directorate General for Education and Science Statistics (DGEEC);
- National Agency for Qualification and Education and Vocational Training (ANQEP);
- Inspectorate General for Education and Science (IGEC).

The purpose was to review the process and timelines and to solicit the first round of stakeholder input to inform standards development. Each department was asked to submit an analysis of the context of current inclusive education in Portugal that included identification of objective/priorities of Law 54 and strengths and weaknesses associated with implementation. All education departments responded.

### **1.2 Draft Framework Development**

Agency staff synthesised information across the education departments involved to produce a summary of priorities, and identify common strengths and challenges, and similarities and differences across agency reports. This information was used to develop the initial draft standards framework. For this task, standards were operationally defined



as ‘a statement that indicates levels of quality or attainment that can be used as a measure, norm, or benchmark in comparative evaluation’. Draft standards were developed in cases where there was strong agreement about priorities across the different ministerial departments, for example in the case of ‘Voices of children and families’. Areas where considerable challenges were noted, such as ‘Support for learners’, were also chosen for standards development. Finally, draft standards were developed in areas where there was disagreement in terms of strengths and weaknesses, such as ‘Professional Learning’.

A Second Technical Meeting was held on 10 September 2020, to review the draft standards framework and descriptors with Portuguese stakeholders and identify the set of standards to be considered in an analysis of implementation of Law 54. Six standards were selected and refined based upon stakeholder feedback.

### **1.3 Country Comparisons: Estonia and Norway**

To inform the analysis of relevant European practices, especially those that could be applicable to the Portuguese context, Estonia and Norway were identified as European countries relevant for their design of indicators and monitoring strategies for assessing inclusive education. In October 2020, policy decision-makers from these countries were asked to submit a ‘Country Contribution’ document summarising key elements of legislation, activities, programmes, resources, monitoring, and accountability associated with inclusive education in their countries.

### **1.4 Draft Standards Framework Application**

In November 2020, Agency staff used the draft standards and descriptors resulting from the Second Technical Meeting to analyse the Country Contribution reports. The purpose of this analysis was to assess the relevance and validity of the standards for describing and identifying good practices in inclusive education relevant to the Portuguese context. The draft standards framework proved to be an effective tool for analysing inclusive education practices at the country level.

### **1.5 Interviews with Key Decision-Makers**

To gain insight on progress and issues associated with the implementation of Law 54 and the impact of COVID-19 on inclusive education in Portugal, members of the Agency team conducted 13 virtual interviews with representatives from: Directorate General for Education; Cabinet of the Secretary of State for Education; Directorate General for Schools; Directorate General for Education and Science Statistics; National Agency for Qualification and Education and Vocational Training; Inspectorate General for Education and Science; Regional Authority for Schools (Norte, Lisboa e Vale do Tejo, Centro, Alentejo, Algarve); National Parents’ Association National Confederation; National Association of School Cluster Directors.

The interview protocol was developed to gain input on each candidate standard and to discuss potential indicators or evidence associated with each standard. Interviews were conducted virtually by at least two members of the Agency team following a standard protocol. The interviews were recorded, and team members also took notes during the interviews. Following each interview, the recordings and notes were integrated into an



Individual Interview Summary for each interviewee. The Individual Summaries were aggregated by question into an Aggregate Interview Summary Document. The aggregate interviews were analysed by question using major theme analysis and a coding framework for each standard and indicator. Next, codes were compared across respondents to identify common themes raised by most respondents, specific themes mentioned by a smaller number of respondents, and issues for further exploration. Findings from the interview analysis were reported by standard and indicator.

Analysis of responses to questions, as well as about the impact of COVID-19 on inclusive education, are presented in this report (see III A).

### **1.6 Survey Development, Deployment and Analysis**

To gain further insight on progress and issues associated with the implementation of Law 54 and the impact of COVID-19 on inclusive education in Portugal, an online survey was developed by the members of the Agency team with input from the Ministry. The survey contained 170 items of four types: ratings (on a three-point scale: fully implemented, partially implemented, not yet implemented) of the relevance of various aspects of inclusive education as defined by the standards and indicators; ratings of the impact of COVID-19 on inclusive education in Portugal; open-ended items to gain additional comments and feedback on the standards, indicators and COVID-19 impact; and a selection of demographic characteristics of respondents.

The national survey sample was composed of 157 professionals from 16 school clusters selected in consultation with the Ministry of Education. School directors, school co-ordinators, members of multi-disciplinary teams (EMAEI), and Resource Centres for Inclusion (CRI) staff from all five national regions were sampled (Norte, Centre, Lisboa e Vale de Tejo, Algarve, and Alentejo). School clusters involved were located at Alcobaça, Aveiro, Chaves, Coimbra, Constância, Evora, Guimarães, Lisboa, Marinha Grande, Monforte, Portimão, Porto, São Pedro de Sul, Setúbal, Viana do Castelo, Vila Real de Santo António.

Two rounds of online survey data collection were conducted in June–July 2021 and again in September–October 2021. Ninety-seven responses were received, resulting in a 62% response rate. All regions and professional profiles were represented.

Quantitative analysis of survey findings included distribution of ratings for each item, and modal rating. Cross-tabulations were conducted to examine patterns of response by region and role. Major theme analysis was used to summarise the open-ended responses.

### **1.7 Survey and Interview Cross-Analysis**

To identify areas of consensus and divergence on stakeholder views of implementation of inclusive education in Portugal, the findings of the SRSP Survey and the results from the Decision-Maker Interviews were compared.

Both the interviews and the survey used the same framework of six standards and eleven indicators for inclusive education. Comparison between survey and interview results was made by standard and indicator. Any variation by respondents' profile (e.g. school director, co-ordinator, etc.) and region (e.g. Norte, Centro) was noted.



Results were reported by standard and indicator (See III B). Consensus and divergence between survey and interview findings were discussed and areas for further exploration, possibly during the school site visits, were noted.

### **1.8 School Visit Planning and Fieldwork**

The team from the Agency made plans to visit 16 school clusters to validate and refine the standards-based system to monitor the implementation of Law 54 on inclusive education. COVID-19 restrictions limited access to some school clusters and the actual number of clusters visited was reduced from 16 to 9, still representing all regions of Portugal. School clusters visited were: Antonio Arroio, Ordem de Santiago, Cister, Cerco, Virginia Moura, Marinha Grande, Gabriel Pereira, Monforte, Bemposta.

The standards-based system permits comparison of existing educational provisions and/or practices with desired standards identified by all educational stakeholders.

All visits to school clusters were organised as follows:

- Two to three members of the Agency team, involved in the full analysis, attended the school visits.
- Visits were done in Portuguese whenever possible with support from Portuguese colleagues. Interpretation was available in cases when English was necessary.
- An individual agenda was prepared in advance for each school cluster. Timing and composition of the focus groups was decided with input from the Ministry and the school cluster. The agenda was sent in advance before the school visit took place.
- At each site participants included: school cluster directors and co-directors; school cluster co-ordinators; EMAEI co-ordinators; support service providers; CRI co-ordinators; teachers; parents; learners and non-teaching staff.
- The school clusters visit took place during two working days, according to the following schema:
  - visit to a number of schools belonging to the cluster, prioritising to visit schools from different educational levels;
  - visit to the classes, observation and exchange of information with teachers and/or professionals from classes representative of the schoolwork;
  - focus groups, exchange of information and discussion with stakeholders selected according to agreed priorities. Usually, 10 to a maximum of 20 people were involved in each focus group. Focus groups were recorded, with agreement of the participants, to ensure that all information was correctly understood and to avoid misinterpretations. Participants were informed in advance and their formal agreement was noted. All recordings were deleted after analysis;
  - summing-up, each school visit was finalised with an exchange of information with participants. Discussion was about the main issues raised during the focus groups and visits as well as the school's feedback regarding the standards discussion.



Aggregated field notes from observations and transcripts of interviews and focus groups were organised by each standard and indicator. Members of the Agency team reviewed the school visit feedback for each standard to determine the validity and applicability of each standard to current practice in schools and to assess the value of the standard and indicators in assessing those aspects of inclusive education that are fully implemented, partially implemented, and not yet implemented, based upon stakeholder reports. Field notes and transcripts were also ordered in terms of four stakeholder perspectives: directors/co-ordinators, teachers, parents, and learners. Commonalities and differences across stakeholder groups were noted.

Analysis of school visit results are presented in this report (see III C).

### **1.9 Integrated Analysis and Reporting**

For the final analysis, team members looked across all data sources (e.g. document review, interviews with key decision-makers, survey findings, and school cluster reports) to identify evidence to support or refute the validity of the standards and indicators. In some cases, standards and indicators were adjusted or refined based upon this integrated review. The final set of recommended standards and indicators can be found in the next chapter.



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## II – RESULTS ACHIEVED

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### II A – Designing a monitoring system

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As already described in the previous chapter, the Agency has selected a methodology based on standards. Identification of standards needs a clear understanding and agreement by all parties involved; they are supporting a ‘visionary’ education process. Standards can be accompanied by a set of indicators. If a standard provides an indication on what should be reached, indicators are the parameters, or measures, that allow progress achieved over time to be determined.

An important work was conducted together with the Portuguese stakeholders to identify the six standards to be considered.

The team agreed on 11 indicators and 19 related questions that have been permanently reviewed and validated through a number of activities conducted with decision-makers, professionals from the field, learners and families.

The monitoring system reflects, at the present time, the level of implementation of the identified standards, corresponding to key areas of the law. Standards can be *fully implemented*, when they are fully embedded, established and sustainable in policy and practice. They can be *partly implemented*, when policy and/or practice are moving toward implementation but are not fully embedded or sustainable. Standards are *not yet implemented* when policy and/or practice require major development and attention.

The six standards developed with stakeholder inputs are by nature aspirational. Therefore, it would be difficult to expect that they were – only two years after the law was passed – already be embedded in the current education system. Most standards are considered as partly implemented, meaning that they require additional development. This should be interpreted as a very positive result. It indicates that work is underway and should form a good basis for future improvement.

The monitoring system will also provide the basis for concrete proposals addressed to schools to support them in implementing the law.

Finally, the monitoring system also provides a basis to be used to measure progress achieved over a time.

The final set of standards, indicators and questions are presented below. Standards are clarified by descriptors that provide a comprehensive description of the standard. The main purpose of the indicator is also given. Each indicator is accompanied by questions that enable the required information to be collected. As mentioned in the previous chapter, these questions were used as open questions for the individual interviews addressed to decision-makers and with professionals, parents and learners involved in the focus groups. They were used as closed rated questions using an ‘agree/disagree’ format in the survey (see Annex 1).



Table 2 below presents the standards, indicators and questions.

**Table 2. Standards and indicators**

<b>Standards</b>	<b>Descriptors/ Statements of the Standard</b>	<b>Indicators</b>
<p><b>Standard 1</b> <i>Inclusive values, principles and policies are shared and accepted by all.</i></p>	<p>Inclusive values and principles are shared and accepted by all: decision-makers, the entire school community, families, parents.</p>	<p><b>Indicator 1:</b> <i>Inclusive education and quality of education are understood by all stakeholders as inter-related.</i></p> <p>Indicator 1 looks at stakeholders referring to inclusive principles when defining ‘quality education’.</p> <p>Two questions are related to indicator 1: How do you define inclusive education? How do you define a quality education?</p> <p><b>Indicator 2:</b> <i>Mechanisms are in place to ensure that all stakeholders are informed about the values and principles of inclusive education.</i></p> <p>Indicator 2 looks at the existence of permanent and accessible mechanisms addressed to all stakeholders to inform them of and explain the values and principles of inclusive education.</p> <p>One question is related to Indicator 2: What types of information on inclusive education have you received, when and from whom?</p>
<p><b>Standard 2</b> <i>The required resources are available and accessible to support inclusive education.</i></p>	<p>Financial, human and technical resources are mobilised, available and accessible to support inclusive education so that everyone learns and participates in learning and is part of the educational community.</p>	<p><b>Indicator 3:</b> <i>Required resources are provided and applied to support inclusive education, in accordance with schools’ needs.</i></p> <p>Indicator 3 looks at clarity of criteria (information and accessibility) for ensuring the provision of financial, human and technical resources.</p> <p>Three questions are related to Indicator 3:</p>





Standards	Descriptors/ Statements of the Standard	Indicators
		<p>What criteria are used to allocate resources to support inclusive education?</p> <p>Who is responsible for resource allocation decisions?</p> <p>What types of resources are requested most often?</p> <p><b>Indicator 4:</b> <i>Provision, availability, accessibility and efficiency of resources are continuously reviewed.</i></p> <p>Indicator 4 looks at monitoring and review of the required resources over time.</p> <p>One question is related to Indicator 4: How difficult is it to obtain resources?</p>
<p><b>Standard 3</b> <i>Schools are organised and managed autonomously to support all learners in the most appropriate way.</i></p>	<p>All required types of support are in place to support schools and learners in an efficient way.</p>	<p><b>Indicator 5:</b> <i>Clear mechanisms to support schools and learners are in place, ensured and monitored.</i></p> <p>Indicator 5 looks at clear mechanisms to support inclusion that are available to inform, provide and review the required support to schools and learners.</p> <p>Two questions are related to Indicator 5: To what extent do schools provide support to learners according to their individual needs? How is support provided to learners as they transition to the next education level?</p> <p><b>Indicator 6:</b> <i>Schools are involved and manage support autonomously.</i></p> <p>Indicator 6 looks at how schools are able to plan the implementation, management and review of the required support.</p>



Standards	Descriptors/ Statements of the Standard	Indicators
		<p>Two questions are related to Indicator 6:</p> <p>To what extent do teachers and other professionals collaborate to provide individualised support?</p> <p>In what ways are school leaders involved in managing and providing educational support to learners?</p>
<p><b>Standard 4</b> <i>Learners' and families' voices are respected and considered.</i></p>	<p>Learners and families are fully involved in the entire educational process.</p>	<p><b>Indicator 7:</b> <i>Policies and operational mechanisms are in place ensuring the full involvement of learners and their families.</i></p> <p>Indicator 7 looks at existing mechanisms that ensure that learners and families are involved in the planning and evaluation of required resources and support, despite discrepancies in literacy, language or cultural diversity.</p> <p>One question is related to Indicator 7:</p> <p>How do educational planning and evaluation of accommodation, curricula, resources and/or support consider learners' and families' opinions?</p> <p><b>Indicator 8:</b> <i>Clear mechanisms exist to resolve conflicts or discrepancies.</i></p> <p>Indicator 8 looks at existing mechanisms to resolve conflicts or discrepancies.</p> <p>One question is related to Indicator 8:</p> <p>How are conflicts or discrepancies between school professionals and families regarding support, assessment and/or other inclusive education issues resolved?</p>
<p><b>Standard 5</b> <i>Training and professional development are effective and accessible.</i></p>	<p>Inclusive education is part of initial training, as well as of effective and accessible professional development opportunities for all</p>	<p><b>Indicator 9:</b> <i>Provision of professional development concerning inclusion is ensured for all school personnel.</i></p> <p>Indicator 9 looks at how the provision of professional development concerning inclusive education is ensured to all school</p>



Standards	Descriptors/ Statements of the Standard	Indicators
	professionals involved in education.	<p>staff, including educators and other professionals.</p> <p>Three questions are related to Indicator 9:</p> <p>To what extent are newly graduated teachers prepared to teach in inclusive settings?</p> <p>What kinds of opportunities to learn about inclusive education are available for all school professionals?</p> <p>To what extent do teachers and other professionals take advantage of learning opportunities?</p> <p><b>Indicator 10:</b> <i>School leaders promote professional development opportunities in inclusive education.</i></p> <p>Indicator 10 looks at how school leaders use and promote professional development on inclusive education addressed to teachers and all other school professionals.</p> <p>One question is related to Indicator 10:</p> <p>To what extent do school leaders promote participation in professional development for inclusive education?</p>
<p><b>Standard 6</b></p> <p><i>Success and certification.</i></p>	<p>The educational system promotes and ensures equal opportunities for all learners, enabling them to acquire a level of education and training that permits them to be fully socially integrated.</p>	<p><b>Indicator 11:</b> <i>Policy and operational mechanisms are in place to ensure success for all learners.</i></p> <p>Indicator 11 looks for clear mechanisms in place to ensure the assessment, evaluation, progression and certification for all learners.</p> <p>Two questions are related to Indicator 11:</p> <p>What assessment information is available for evaluating learners in the framework of inclusive education?</p> <p>To what extent do all learners have access to learning results and certifications?</p>



Implementation of standards per activity (individual interviews, survey and fieldwork) is presented in the following chapters.

## **II B – Analysis results: Cross-Analysis of School Visit, Stakeholder Survey Findings and Decision-Maker Interview Results**

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To establish the validity and utility of the proposed standards framework as a basis for monitoring the implementation of inclusive education (Law 54) in Portugal, cross-analysis was conducted across the three primary data sources: Decision-Maker Interviews, Stakeholder Surveys, and School Visits.

All data sources used a common framework of six standards and eleven indicators. Cross-analysis was conducted at the standard and indicator levels. Variations by respondent profile (e.g. decision-maker, school director, parent, etc.) and region (e.g. Norte, Centro) were noted when possible. Consensus and divergence between and across data sources were also explored.

Results of the cross-analysis are reported below for each standard. In addition, evidence is presented to indicate the level of implementation of each standard: full implementation, partial implementation, and not yet implemented.

### **Standard 1: Inclusive values, principles and policies are shared and accepted by all.**

Cross-analysis revealed high levels of consistency across the three data sources and convincing evidence that implementation of Standard 1 is well underway, approaching *full implementation*. Decision-makers interviewed embraced inclusive values, principles and policies, and shared a common view of inclusive education in Portugal. Survey respondents were also highly accepting of inclusive values and their relevance for education in Portugal, with more than 90% rating all statements as ‘Highly Accurate’ or ‘Somewhat Accurate’. Inclusive education values and principles were shared by all stakeholders during the school visits.

Definitions and perceptions of inclusive education varied slightly across groups, but values of quality education, diversity, respect for and acceptance of differences, trust, well-being of learners, belonging, collaboration, and success were commonly articulated. School personnel expressed strong commitment to inclusive education and reported that much effort is being put into collaboration to support all learners and transformation from a competitive to an inclusive school culture. Stakeholders acknowledged that on-going work was needed to continue to develop school culture, management, support and organisation to achieve inclusion for all learners, especially those most vulnerable, but evidence suggests that inclusive values, principles and policies are shared and accepted by all stakeholders.

*Indicator 1: Inclusive education and quality education are understood by all stakeholders as inter-related.*

Across data sources, stakeholders saw inclusive education and quality education as inter-related. There is a shared belief that inclusive education will lead to a higher quality of education and better outcomes for all. It was commonly expressed that inclusive



education requires reduction of bias and discrimination, and a commitment to ensuring the rights of all learners to reach their full potential and become a contributing member of society, regardless of their personal and social situations.

*Indicator 2: Mechanisms are in place to ensure that all stakeholders are informed about the values and principles of inclusive education.*

Decision-makers described a robust process to inform all stakeholder groups about the values and principles of inclusive education that began two years before the passage of Law 54 and included conferences, public meetings, national guidelines and support manuals, national training courses, regional support teams, and professional development from training centres, universities and teacher training programmes. Survey and school visit findings acknowledged and appreciated existing communication channels but encouraged further development of mechanisms to align local and regional policies with inclusive values and belief, to infuse inclusive values and principles into pre-service and in-service training for all school personnel, and to ensure that all learners and families are informed.

**Standard 2: The required resources are available and accessible to support inclusive education.**

Cross-analysis revealed high levels of consistency across the three data sources and convincing evidence that implementation of Standard 2 is *partially implemented*. Decision-makers believe that the spirit of Law 54 is to give schools the authority to decide what resources they need for all students to learn and develop to their potential. They described a clearly defined process in which human resources (HR) were allocated nationally according to school requests and other resources are provided regionally and locally. They expressed confidence in the allocation process and indicated that resources were fairly and adequately distributed for most schools. Survey respondents were in general agreement regarding who was responsible for resource allocation and which resources are most frequently requested, but were somewhat less positive about the clarity of the resource allocation process and the adequacy of resources. During the school visits, it was observed that schools are using a wide array of resources and that the provision of technical and other material resources to support inclusive education has been generally adequate in recent years. However, the COVID-19 pandemic has placed additional stress on the educational system with teacher shortages in key areas and increased need for education, therapeutic and mental health support for learners.

*Indicator 3: Required resources are provided and applied to support inclusive education, in accordance with schools' needs.*

School directors were in general agreement that the Ministry provides required resources in accordance with schools' needs, but reported that in order to overcome HR challenges, they have begun to search proactively for external support for learners in collaboration with the municipality. Subject teachers, speech therapists, social workers, and operational assistants were most often in particularly high need. School directors saw increased support from municipalities as a positive trend, as did teachers and parents.



*Indicator 4: Provisions, availability, accessibility, and efficiency of resources are continuously reviewed.*

While decision-makers felt that resources for inclusive education were adequate and available to schools, some respondents felt that the resource allocation process was too long, and negatively affected by staff shortages in key areas, absenteeism, and lack of flexibility. As noted above, school directors desire – and are taking – more autonomy to recruit teachers and other school staff in response to these challenges. While there was general consensus that the resource allocation process was continuously reviewed, some stakeholders felt special attention should be paid to the recruitment, training and retention of operational assistants in the classroom.

**Standard 3: Schools are organised and managed autonomously to support all learners in the most appropriate way.**

Cross-analysis revealed high levels of consistency across the three data sources and convincing evidence that implementation of Standard 3 is *approaching full implementation*. Across all data sources, school directors and the multi-disciplinary team were seen as responsible for organising and managing support to all learners. This was recognised as an essential part of the paradigm shift toward inclusive education. The individualised educational plan describes the support necessary for a student to be successful. The plan is revised each year and travels with the student so that supports change as needs change, and continuity across educational levels or setting is ensured. Schools are aware and implement measures to support learning according to three levels of intervention: universal measures, selective measures, and additional measures. Regional and local resources such as learning support centres, reference schools, Resource centres for inclusion (CRIs) and universities are also used to support inclusive education. Monitoring occurs at national (annual survey), regional (DGEstE annual plans and site visits), and local clusters (multi-disciplinary team meetings).

*Indicator 5: Clear mechanisms to support schools and learners are in place, ensured and monitored.*

All three data sources indicate that school staff are confident in their ability to make autonomous decisions and address learner needs concerning curricular accommodations, barriers, and supports for learning. Evidence suggests that careful monitoring of supports is provided by the EMAEI and, when required, by CRIs. Legislation also clarifies the procedures for monitoring supports.

*Indicator 6: Schools are involved and manage support autonomously.*

Decision-makers believed that the legislation sets clear guidelines for supporting learners as they transition across levels of the educational system and that multi-disciplinary teams play a critical role in managing transitions. Survey and school visit findings support that notion. It is clear that school staff from different levels of the system collaborate with each other and with CRIs to design and manage supports. The school director and EMAEI play a critical role in this process. Confidence in school staff and multi-disciplinary teams' ability to collaborate among themselves and with resource centres to support transitions was high. Findings also indicated that transition support was important for all students, not just students with the most severe learning difficulties. While the legislation intended



that all school staff are involved in providing support for inclusive education, survey and school visit results fell short of confirming that all teachers and school staff are involved. School visits also revealed different and creative support strategies across school clusters, with teachers reporting that they are constantly rethinking and adjusting support provision to maximise learning.

**Standard 4: Learners’ and families’ voices are respected and considered.**

Cross-analysis revealed high levels of consistency across the three data sources and convincing evidence that implementation of Standard 4 is *partially implemented*. Stakeholders believe that the spirit of the legislation valued and considered learner and family voices in inclusive education. Legislation clearly outlines legal and operational mechanisms to involve families in planning and decision-making regarding their child’s education, such as EMAEI, parent associations and school councils. Mechanisms for including learners themselves are less well addressed. There was consensus that processes exist for resolving conflicts and discrepancies.

*Indicator 7: Policies and operational mechanisms are in place ensuring the full involvement of learners and their families.*

There was substantial agreement across data sources that mechanisms to ensure families’ and guardians’ involvement in planning and decision-making for their children’s inclusive education are in place. School visits also revealed more informal mechanisms to enhance family involvement, such as open school days or family events. Some schools reported higher levels of family involvement (via technology) during the pandemic, others reported greater challenges in engaging families, especially during the initial lockdown. Schools report greater family involvement in the lower grades. While learner involvement is not prominent in the legislation, school visits revealed some effective strategies for engaging students in their own educational planning and evaluation, especially at the upper grade levels. It is clear that extra attention is needed to reach the most marginalised and disenfranchised families, such as family liaisons, multi-lingual communications, social mediators and financial supports.

*Indicator 8: Clear mechanisms exist to resolve conflicts or discrepancies.*

There was general agreement that conflict resolution mechanisms are in place. Consensus indicates that strong communication mechanisms are needed to make sure that families and learners are aware of their rights, and that accessible school personnel who will listen to and resolve problems are key to successful implementation.

**Standard 5: Training and professional development are effective and accessible.**

Cross-analysis revealed high levels of consistency across the three data sources and convincing evidence that implementation of Standard 5 is *partially implemented*. All data sources described a strong national programme of free teacher professional development on inclusion in which all schools are required to participate. Training centres also offer professional development on inclusion. Teachers must participate in professional development to advance in their careers and salaries, so incentives for teachers to participate are clear. Since most existing professional development is aimed at teachers, stakeholders identified a need for professional development on inclusion for other types



of professionals and school staff, including non-instructional staff such as admin support and operational staff. Topics for additional professional development were identified, such as multilingualism, technology integration, cultural awareness, mental health issues, new pedagogies, and behaviour management. Across data sources, stakeholders were less aware of how inclusion was addressed in programmes that prepare teachers. There was a general consensus from the survey and school visit findings that newly qualified teachers are not well-prepared to teach in inclusive settings and should have experience with universal design and inclusive pedagogy at the initial teacher education level.

*Indicator 9: Provision of professional development concerning inclusion is ensured for all school personnel.*

As noted above, cross-analysis findings indicated that formal professional development on inclusion for teachers is widely available and that teachers take advantage of these opportunities at a high rate. Less training is available for other school personnel and incentives for participation are less clear. Cross-source analysis also indicated that there is a need for more practical, case-based training opportunities rather than those focusing on theory or values of inclusion. There is also a desire for more local, informal, peer-to-peer professional learning opportunities to allow practitioners to support each other and advance inclusive practices. In addition to professional development focusing on inclusion, findings indicate a need for training in inclusion-adjacent skills such as collaboration, teaming, leadership, cultural awareness, and effective communication for school personnel. One concern raised across data sources was the limited time available for formal and informal professional development.

*Indicator 10: School leaders promote professional development opportunities in inclusive education.*

Across all data sources, stakeholders were confident that school leaders actively encouraged teachers in their schools to participate in professional development in inclusive education because the country-wide programming was free, teachers are required to take professional development to advance in their career, and it was in the best interest of the school to have teachers well trained in inclusion. Training centres and regional inspectorates work with school directors to develop training plans for each school. Findings indicate that the role of school leaders is crucial in planning professional development, and mentoring school staff on inclusion. There was very high agreement that capacity building for inclusion and setting expectations for professional development are central to the job of school leaders. It was recognised that despite the availability of professional development on inclusion, not all professionals are reached.

### **Standard 6: Success and certification.**

Cross-analysis revealed high levels of consistency across the three data sources and convincing evidence that implementation of Standard 6 is *not yet implemented*. Law 54 – and also Law 55 – are changing the way that schools think about and conduct assessment and certification. Traditionally, assessment has been seen as a means of guiding students toward a career or higher education. With the introduction of the Student Profile and Citizenship and Development Programme, that focus is broader and allows for more differentiation and flexibility in how success is defined and measured. This will increase





the likelihood of success for all learners but presents challenges to schools in terms of implementation and accountability. Because these laws are new, assessment definitions and practices differ widely across school clusters. Schools report challenges with assessing social outcomes. While some schools are taking steps to include more formative assessments and to broaden the educational outcomes assessed, others are still very much oriented toward the national examinations to define learner success, especially at the secondary level. Professional development on differentiation and assessment was seen as a high priority.

*Indicator 11: Policies and operational mechanisms are in place to ensure success for all learners.*

Stakeholders recognise that assessment must change to fully realise the goals of inclusive education. Laws 54 and 55 set the goals for assessment and accountability, but schools are challenged to design and implement new assessment practices and, at the secondary level, are still reliant on national exams. There is a huge need for professional development on assessment for inclusion. Stakeholders also expressed a need for strategies to involve learners and families in the assessment process.

The findings of the cross-analysis provided strong evidence in support of the validity and utility of the proposed standards framework for monitoring implementation of inclusive education in Portugal. Findings from the cross-analysis support alignment of the standards framework with key elements of Law 54. Stakeholders at all levels of the system and regions of the country attested to the usefulness and comprehensiveness of the framework for describing the implementation of inclusive education in Portugal. Most importantly, the standards framework was able to identify differences in implementation of various elements of inclusive education in Portugal at national and school levels. These findings provide strong support for use of the standards framework as a means of assisting the Ministry, Regional Offices and schools in implementing inclusive education in Portugal.



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## III – ANALYSIS OF ACTIVITIES CONDUCTED

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### III A – Individual Interviews

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To gain insight on progress and issues associated with the implementation of Law 54 and the impact of COVID 19 on inclusive education in Portugal, members of the Agency team conducted virtual interviews with 13 decision-makers. They were selected in consultation with the Ministry. Interviews were conducted with representatives from: Directorate General for Education; Cabinet Secretary of State for Education; Directorate General for Schools (DGEstE); Directorate General for Education and Science Statistics (DGEEC); National Agency for Qualification and Education and Vocational Training (ANQEP); Inspectorate General for Education and Science (IGEC); Regional Authorities for Schools (Norte, Centro, Lisboa e Vale do Tejo, Alentejo, Algarve); National Association of School Cluster Directors; National Parents' Association National Confederation (CONFAP).

Each Interview was conducted virtually by at least two members of the Agency team following a standard protocol. The interviews were recorded, and team members also took notes during the interviews. Following each interview, the recordings and notes were integrated into an Individual Interview Summary. The Individual Summaries were aggregated by question into an Interview Summary Document. The aggregate interviews were analysed by question using major theme analysis, then responses were compared across respondent to identify common themes raised by most respondents, specific themes mentioned by a smaller number of respondents, and issues for further exploration. Findings from the analysis of individual interviews are reported by standard and indicator. Responses to questions about the impact of COVID-19 on inclusive education are summarised in a separate section.

#### **Findings from the Individual Interviews**

**Standard 1: Inclusive values, principles and policies are shared and accepted by all.**

*Indicator 1: Inclusive education and quality education are understood by all stakeholders as inter-related.*

Common themes: Many stakeholders interviewed associated broad concepts of equity, access, and engagement with inclusive education, such as:

- Goes beyond integration to have all students engaged in the life of the school and the community. All students involved in decision-making.
- Lifelong learning opportunities so that students can continually gain skills necessary to participate in society.
- Capacity of the system to reach all learners and support them to develop to their full potential.
- Equal access to learning opportunities.
- No segregated schools or special classes.



- Not limited to students with disabilities, but includes all students, no need for labelling.
- Requires cultural change, culture/communities/society must accept and appreciate diversity.
- Holistic perspective considering academic, social, emotional, physical, and career development.
- Individualised learning paths to reach success.

Most stakeholders believe that inclusive education is a necessary condition for quality education. Other common themes included:

- Equal opportunity for success independent of the background of students and families, and personal characteristics (origin, race, gender, socioeconomic standards, geographic location).
- Everyone develops fundamental competencies to be active citizens, achieve independence.
- Quality educational infrastructure, quality human resources able to meet the needs of students.
- Education that is aware of all individuals' needs and provides the required support and resources to improve all learning and teaching opportunities.
- Education takes into account context, and identifies and overcomes barriers.

Specific themes: While some stakeholders emphasised broader, more philosophical areas such as values and principles, others were more focused on the operational policies and practices of inclusive and quality education such as:

- Differentiated pedagogical strategies that allow all learners to achieve success.
- Application to both public and private schools.
- Flexible curricula, including academic, social, emotional, career development.
- Involvement of the entire school community: not only teachers, but also students, specialists, operational support providers and school leaders.
- Schools organised and managed to support all students.
- Student 'profile' should state the essential minimum acquired by every learner when leaving compulsory education.
- Schools must have autonomy to address needs of their students/clusters.
- Quality education also includes professionals who are trained to implement and diversify practices to meet student needs.

Issues for further exploration: During the survey and site visit phases of this study, it may be useful to collect further information on:

- The extent to which the population of students served has expanded beyond students with disabilities to include other groups.



- The extent to which lifelong learning (from birth through to adulthood) opportunities are available.
- The vision/role of families in inclusive education (rarely mentioned by interview respondents).
- How learners define inclusive education.

*Indicator 2: Mechanisms are in place to ensure that all stakeholders are informed about the values and principles of inclusive education.*

Common themes: Stakeholders generally described a decentralised process that began about two years before the passage of Law 54, with many conferences and public meetings held at local, regional and national levels involving different stakeholder groups: school leaders, teachers, families, government officials, community members, universities, and teacher training programmes. These meetings helped shape Law 54. After passage of the law, other mechanisms were routinely mentioned, such as:

- The General Directorate (DGE, working across departments in the Ministry of Education, Ministry of Health, and National Rehabilitation Service) prepared guidelines (Framework for Inclusion; Student Profile) and an inclusive practice support manual which were disseminated to all schools and regional authorities.
- Teacher development materials, including a national training course, were also disseminated by DGE.
- Regional teams were created to support school leaders and teachers to implement the framework/guidelines.
- Indicators for inclusive education were disseminated (DGEEC) and annual surveys were administered in 2020 and 2021 to assess status on these indicators in schools and regions; Ministry followed up based on survey results.
- A second national training course on inclusive education for teachers is being prepared for launch in the 2021–22 school year.
- The media disseminates information about inclusion to the general public.
- Additional training programmes and information have been developed by training centres, universities and HE centres (Porto University and Porto High School of Education), and trade unions.
- Ministry of Education has organised information sessions at national, regional, and local levels.

Specific themes: Some stakeholders mentioned that while families and learners were included in some of the conferences and meetings mentioned above, these interactions were largely among professionals and that there was not a rigorous mechanism in place to inform families and learners about the values and principles of inclusive education.

Other respondents expressed concern that most of the information and training has been directed at teachers and school leaders. Other groups, such as members of the multi-disciplinary teams (e.g. specialists, therapists), operational staff, families, learners,



employers, community organisations, local governments, universities, and other higher education institutions, need information and training.

Some respondents believe that the initial information disseminated focused heavily on the values and principles of inclusion. Now stakeholders could benefit from more concrete, operational information about how to implement inclusive education in schools and communities. There is hope that the second round of national training will focus more on the practical aspects of implementation for all school personnel and communities.

Issues for further exploration: Most respondents expressed that Portugal is in a transition period – that school leaders, teachers, learners are developing their vision and skills in inclusive education, but that more information and training is needed to move the country further toward its goal of inclusive education. Related issues for follow up include:

- The extent to which regional centres are fulfilling schools' needs for information and training.
- The need for information and training among the various stakeholder groups involved in inclusive education (e.g. specialist, operational assistants, families, learners, community members, employers, higher education, and vocational training).

**Standard 2: The required resources are available and accessible to support inclusive education.**

*Indicator 3: Required resources are provided and applied to support inclusive education in accordance with schools' needs*

Common themes: The spirit of the law is to give schools the authority to decide what resources they need for all students to learn and develop to potential. Most respondents described a largely centralised process in which human resources are allocated nationally and other resources are provided regionally and locally:

- The school prepares an annual request that is first sent to the Regional DGEstE and then to the Ministry.
- Human resources are allocated by the Ministry of Education (Director General of School Administration) according to the number of students in the school.
- There are criteria which allow a school to receive additional resources from the Ministry, such as free meals for students, more teachers, more specialists, and more hours for support services.
- Other resources can be requested from the Resource Centres for Inclusion, Resource Centres for Information and Communication Technology, the Ministry of Social Affairs (which also provides resources directly to families), and regional (DGEstE) and local authorities.
- DGEstE often does site visits or talks with school leaders to document needs before the General Directorate for School Administration approves allocations.



- Human resources are the most requested: teachers (special education and subject specialists); psychologists and occupational/speech therapists; assistants and operational support.

Specific themes: Some respondents reported that resource allocation is in a transitional phase where municipalities and regions are taking on more responsibility for giving extra resources to schools. One respondent mentioned that community and private entities also provide resources. One respondent reported that the city council can provide some human resources, such as technical support.

Issues for further exploration: It was mentioned by a few respondents that the criteria for assigning resources are public, while others stated that the criteria were defined by each school or school cluster. Some respondents reported that the multi-disciplinary team was involved in asking for resources, while others thought that school leaders were primarily responsible for asking for resources. Some respondents felt that the criteria for allocating special education were unclear and should be based upon frequency and intensity (levels) of support needed instead of student headcount. Some respondents advocated for increased resources for universal support to prevent learners from failing and needing increased levels of support. Some respondents reported that criteria for support were most aligned with special education students' needs and less relevant for other groups of students. In 2020–2021, the National Programme of School Success allowed some schools to recruit professionals directly. Follow up may be warranted to better understand:

- how much and what types of local support are obtained;
- who is involved in developing the request for resources;
- how school personnel understand the criteria for resource allocation;
- how resources are allocated to serve not only special education, but all students in the school;
- what work psychologists are doing in the schools, given that there are increased requests for them.

*Indicator 4: Provision, availability, accessibility and efficiency of resources are continuously reviewed.*

Common themes: Most respondents described a centralised process for monitoring that included:

- The Ministry of Education (DGEstE) in collaboration with DG Statistics administer an annual survey that represents the set of services provided by the Ministry (Common Assessment Framework).
- DG Statistics also monitors human resources allocated to each school over time.
- When schools are identified as having challenges, they must submit a recovery plan with metrics (working closely with DGEstE). This is considered to be a contract. They receive extra funds and human resources from European Community funds. This has additional monitoring.



- Regional authorities (DGEstE) work closely with schools to prepare plans and resource requests. They also conduct site visits to investigate the validity of resource requests.
- There was an analysis of resource use for CRIs (2020–2021).

Specific themes: While many respondents felt that there were no difficulties obtaining resources, others reported difficulty in the following areas:

- Schools with challenges have difficulty attracting headmasters and teachers.
- The Portuguese teaching workforce is ageing, and young people are not choosing teaching as a profession because of low wages and stressful working conditions.
- There are teacher and specialist shortages in specific areas such as Portuguese language teachers, mathematics and science teachers, and therapists.
- Some parts of the country experience difficulties in hiring professionals (e.g. difficult to live on a teachers' salary in Lisbon, lack of professionals in rural areas).

Issues for further exploration: Some stakeholders reported that while the monitoring of Ministry/European Community resources is extensive, it is not always possible for the Ministry or regional authorities to see other sources of support that schools receive. Multi-disciplinary teams and school leaders are charged with monitoring this at the school level. On the site visits, it might be possible to see how schools monitor all the resources they receive.

New legislation has engaged municipalities in providing extra support professionals and non-teaching staff. It would be good to see how this is working across clusters.

### **Standard 3: Schools are organised and managed autonomously to support all learners in the most appropriate way.**

*Indicator 5: Clear mechanisms to support schools and learners are in place, ensured and monitored.*

Common themes: Most respondents identified the multi-disciplinary team as responsible for providing and monitoring support to learners. School directors are also accountable. Individual learner support needs are described in a document that is revised each year and travels with the learner as they change grades and schools. At the school level, supports are translated into needed resources and submitted to DGEEC through an annual survey.

Most respondents reported that monitoring occurs at different levels: national (through an annual survey), regionally (through regional DGEstEs working with schools to develop annual plans, conducting site visits to validate requests, and investigating problems), and locally (through multi-disciplinary teams and school leaders ensuring that support is provided as planned. There is also a project with OECD to examine the value of inclusive education.

Most respondents identified the school cluster as the main mechanism to ensure provision of support to learners as they move from one level of education to the next. Within the cluster, the headmaster, multi-disciplinary teams and teachers are familiar



with the learners in the cluster and communicate with each other about learner needs. Individual plans follow students as they move from level to level and school to school.

Specific themes: While most respondents felt that school clusters worked well to ensure continuity of service from level to level, others reported that the transition from early childhood to primary school was sometimes difficult because of lack of communication between private pre-school providers and public kindergartens. The Ministry of Social Affairs also funds pre-school education in Portugal. Although there are attempts at co-ordination with the Ministry of Education, early transition can be challenging.

Some respondents reported challenges with transition from secondary to higher education, particularly with students having difficulty passing the exit exams necessary to enter higher education. There is hope that Law 55 will provide more flexibility in representing learner competencies in the Student Profile. Some respondents are also concerned that the necessary resources and supports will not be available to all learners in higher education.

Issues for further exploration: Many respondents indicated that provision of support is a 'work in progress', that schools are reflecting and looking for the best methodologies. There are differences across schools and clusters in their ability to provide continuous support at all levels of the system.

*Indicator 6: Schools are involved and manage support autonomously.*

Common themes: Within the Ministry of Education the AFC (authority and curriculum flexibility) project has a national co-ordination team where General Directorate of Education, General Directorate of Schools, the Inspectorate and all relevant departments are represented. They develop policy measures and articulate information from the regional teams. Regional teams visit schools and work with school leader networks on many issues, including inclusion. Based on interaction with local schools, regional teams report to the national team. Based upon regional reports, the national team determines content for professional development and works with higher education to prepare new teachers.

At the school level, respondents identified directors, other school leaders, school councils and multi-disciplinary team members as most involved in managing support by motivating teachers, allocating personnel and other resources, assigning students to classes, defining the work for technicians, and setting the tone for work with families and regional learning support centres. School leaders also have a political role working with local governments and the Ministry. As schools gain more autonomy (Law 54), the role of school leaders/directors in supporting learners is expanding, especially in curriculum and pedagogy. Directors or deputy directors often serve as co-ordinator of the multi-disciplinary teams, where they are in control of the education process.

Specific themes: While all respondents agreed that school directors are intended to play an important role in defining and managing support to learners, some reported that there is variability across schools and clusters in terms of how actively directors take on this role.





Issues for further exploration: Some respondents report that adequate expertise in inclusive education is present in local schools and regional entities but lacking in higher education and teacher preparation.

**Standard 4: Learners' and families' voices are respected and considered.**

*Indicator 7: Policies and operational mechanisms are in place ensuring the full involvement of learners and their families.*

Common themes: Respondents agreed that the decree law establishes that families and learners must have a voice in educational planning and evaluation of progress. There was also agreement that, while Portugal has made progress in involving learners and families, there is still much work to be done.

Legal mechanisms are in place to involve families in Law 54. Each class within a school must have a parent representative. Parents must also be represented on the school General Council. Families are part of the multi-disciplinary team, participate in planning meetings and sign off on the individual plan for their child's education. If a parent does not participate, the school must take certain actions. Many schools have active parents' associations; others do not.

Respondents expressed that the legal and practical mechanisms for engaging learners in their education are not clear. While there are examples of learners organising at the national level and many schools have student leadership councils (COMPARTE), these are not in all schools and generally involve learners in Grade 7 and older.

Specific themes: Although there was agreement that legal mechanisms for involving families were present, some respondents believe that more should be done to encourage schools to involve parents and that school directors are most important for making families feel welcome in the school and supporting them to contribute to their child's education. While respondents agreed that parent associations are present in the schools, some associations are more active than others. CONFAP works with Centres for Capacitation at the national level to help families feel more comfortable in the schools and in the workforce. There was also concern expressed that higher education should be more engaged in the process, by preparing teachers and school leaders who are able to work effectively with families and who recognise the importance of family and learner engagement in education. Higher education must also expand its capacity to involve learners and families, as more students with individualised learning needs move into post-secondary education.

Issues for further exploration: Citizenship education is intended to promote learner engagement. It is important to understand how it is implemented locally and whether it achieves this goal.

*Indicator 8: Clear mechanisms exist to resolve conflicts or discrepancies.*

Common themes: Respondents generally agreed that mechanisms are in place to resolve conflicts between families and school professionals regarding issues in inclusive education. Within the school, families can work directly with the class teacher, Director, multi-disciplinary team, class council, or General Council to find a resolution. The Parent Association can also be involved.



If that does not work, the family can appeal to the school cluster, regional authority, or even the Ministry of Education. The General Directorate for Education often receives appeals from families, learners, and schools. The Cabinet sometimes receives appeals, but these are generally referred back to the Ministry of Education. The Inspectorate may be asked to visit schools and assist with mediation. As a last resort, decisions may be made in the Court of Justice.

Specific themes: Some respondents felt that local Parent Associations should play a central role in mediation, while others saw engagement of the regional authority or Ministry as the most effective route to a solution.

Issues for further exploration: While most respondents were satisfied with the conflict resolution process, a few mentioned that when school directors served as head of the multi-disciplinary team, it was more difficult to resolve conflicts at the school level, since decisions of the multi-disciplinary team were often being disputed.

### **Standard 5: Training and professional development are effective and accessible.**

*Indicator 9: Provision of professional development concerning inclusion is ensured for all school personnel.*

Common themes: Respondents often differentiated between initial training (teacher preparation) and in-service training (teacher professional development) in their responses. At a national level, the Ministry determines the content for a country-wide programme of free teacher professional development (e.g. courses, webinars, manuals, meetings). All schools are required to participate. Two years ago, the focus was inclusive education, with an emphasis on values and beliefs. The current programme focuses on digital competencies. The Ministry is preparing a second programme on inclusive education to start next year. It will emphasise more practical information on curriculum, accommodations and pedagogy. Other professional development is available from 91 training centres around the country, universities and private providers. Some of this training is free; some is self-pay.

Teachers must participate in professional development to advance in their careers and salaries. Training centres work with school leaders to develop training plans. Most of the training is directed at teachers and assistants. There is also training available for school directors. Since inclusive education is a national priority, it is included in most training plans. Some schools also offer their own training opportunities, including peer to peer professional development. Some respondents recommended that the amount of within school training and exchanges among schools be increased to provide both bottom-up and top-down approaches to professional development.

Respondents often mentioned that the pandemic has increased the use of technology to deliver professional development, reaching more teachers, reducing costs, and providing new opportunities to rural schools. They believe virtual training will continue post-pandemic.

Respondents were generally concerned about the advanced age of the Portuguese teacher workforce (50+ years old), teacher shortages in key areas (e.g. special education, Portuguese language), and the low numbers of young people entering the teaching profession. They also commented that there is a lack of expertise in inclusive education



among higher education faculty and some initial teacher training programmes do not sufficiently address inclusive values and pedagogy in their coursework and practice.

Specific themes: Some respondents felt that while there are sufficient professional development opportunities available for teachers, more training is needed for other groups such as operational assistants, technicians, therapists, and post-secondary faculty and administrators. Other respondents commented that although there are a lot of opportunities for teachers, they could benefit from more case-based training where they could see innovative examples of how schools successfully supported learners and families.

Some respondents advocated for a national evaluation of professional development for inclusive education to assess strengths and needs of the inclusive education workforce. In particular, assessing the effectiveness of virtual training is important.

Some respondents note a lack of professional development on inclusive education for post-secondary and university faculty and support professionals.

Issues for further exploration: Curricular flexibility, increased school autonomy, and implementation of the national plan for school success will require substantial changes in pedagogy, support, and assessment of learners' competencies. It is important that professional development is available and sufficient to support this level of change.

*Indicator 10: School leaders promote professional development opportunities in inclusive education.*

Common themes: Respondents mentioned that each school and cluster have a training plan based upon local context and identified needs. School leaders and multi-disciplinary team members help develop the plan with the Regional Training Centres and encourage teachers to participate. Teachers are required to complete professional development to advance in their careers.

Specific themes: Some respondents commented that although teachers are required to attend training and the majority do, training does not ensure changes in practice and some teachers continue to be resistant to inclusive education. They suggested the development of inclusive education teams to provide pedagogical and curricular guidance, rather than monitoring and evaluation.

Issues for further exploration: It may be useful to explore how school leaders integrate the various sources of professional development (e.g. national, regional, local) to meet the needs of their schools.

## **Standard 6: Success and Certification.**

*Indicator 11: Policies and operational mechanisms are in place to ensure success for all learners.*

Common themes: In general, respondents cited visits by the Inspectorate General and the annual survey conducted by the General Directorate for Statistics as the primary legal mechanisms to ensure learner success. Locally, the school director, multi-disciplinary teams and General Council/Assembly complete a school self-assessment and were seen as responsible for implementing inspection recommendations and monitoring learner



outcomes. Most of this information is public and available to parents and other stakeholders. There are concerns that, while formative assessment is done well in most cases, existing summative assessments are not appropriate for all students and are a barrier to some students reaching their goals. There is hope that the University of Porto's MAIA project will help schools implement appropriate assessments. MAIA has sent information to all schools and the Inspectorate is adapting its monitoring instruments to reflect changes in assessment, curricular flexibility, and personalised diplomas.

Most respondents believe that some students have access to good learning outcomes while others do not. As noted above, there is hope that the new legislation requiring personalised diplomas will increase the likelihood of success for more students. However, there is agreement that the National Assessments create barriers for some students and that more assessments for inclusive education are needed. Schools will need a great deal of support to achieve this goal.

Specific themes: Some respondents reported that the new legislation (Law 55) that requires curricula and competencies to be more flexible to create a personalised diploma will increase the likelihood of success for all learners but will present challenges to the schools in terms of implementation and accountability. There are also concerns about how employers and trade unions will interpret the personalised diplomas. Current assessments were seen as a barrier to success for some students as was lack of alternative assessments, lack of a clear assessment model defined by the supervisory authority, and lack of articulation with the National Examining Board. Concern was also expressed that practices may vary across different vocational training centres.

Although the school completion rate in Portugal is increasing, some respondents are concerned that not enough is being done to engage with school dropouts and put them on a path to employment and independent living.

Issues for further exploration: Respondents are hopeful that the new law will increase curricular flexibility and personalised programmes but are concerned about lack of clear guidance to schools and lack of co-ordination with employers, trade unions and the National Examining Board. It may be useful to assess how local stakeholders are changing their practices to implement the new requirements.

It may be useful to talk with school directors and teachers about their understanding of the new assessment models and assess their level of preparedness for offering personalised diplomas.

### **Impact of COVID-19 on Inclusive Education in Portugal**

Common themes: Most respondents believe that the pandemic (especially the first lockdown in spring 2020) affected all students in Portugal, others believe that inclusive education was more severely affected. In the second lockdown (autumn 2020), many respondents felt that special provisions were made for the most vulnerable students who needed food, special therapies, and other support. Internet and computers were distributed to families who needed them. It is recognised that many students suffered learning loss due to COVID-19. A plan for recovering student learning and competencies was recently announced. That will require additional resources and supports.



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Specific themes: Other respondents felt that the impact of COVID-19 was greater for vulnerable students and families. Some families were more comfortable keeping at-risk children at home. Communication was challenging when families did not have internet access. There were difficulties assessing learner progress and developing individualised plans. Although schools were open for the most vulnerable students in the second lockdown, some respondents feel that many families were reluctant to have their children attend in person and that teachers had difficulty attending to the needs of all students.

Some respondents cited positive impacts of the pandemic, such as effective use of technology to interact with parents and colleagues. They noted that teachers and families became more proficient in the use of digital communication. Others noted that some teachers did not adapt well to the use of technology.

While most respondents felt that all standards were affected by the COVID-19 pandemic, others felt that the greatest impact was felt on Standard 6: Success and Certification. Some felt that the youngest students were most affected, while others thought that high school students were most at risk for dropping out or failing to meet competencies to allow them to proceed with college or vocational training. There is also concern that an economic downturn will affect students' employment outcomes.

Issues for further exploration: It was mentioned that DGEEC conducted an evaluation to assess the impact of COVID-19 on schools. The findings of that survey may be useful for understanding its impact on inclusive education.

## **III B – Online Survey**

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### **Comparison of SRSP Survey Findings with Decision-Maker Interview Results**

Two rounds of online survey data collection were conducted in June–July 2021 and again in September–October 2021 with school directors, school co-ordinators, EMAEIs, and CRIs in five regions: Norte, Centro, Lisboa e Vale de Tejo, and Alentejo. Ninety-seven survey responses were received out of a total of 157 professionals contacted, giving a response rate of 62%.

The survey was divided into sections: one section per standard, one section concerning the COVID-19 impact and one final section to indicate the region and professional profile of the respondent. Participants were requested to answer 19 questions, directly related to the six standards and the eleven indicators. Two more questions were added at the end of the survey concerning the COVID-19 impact.

The survey questions followed the 'agree/disagree' format, where respondents were asked whether they agreed or disagreed with a particular statement. A total of 128 statements were listed covering the 19 questions (see Annex 1). Participants were requested to select one of the three options listed per statement – 'Highly Accurate; Somewhat Accurate; Not Accurate' – the option they considered the most appropriate reflecting their opinion and/or experience of the current situation. Respondents could also add, for all questions, additional information that was considered important to be added because it was not covered in the question.



To identify areas of consensus and divergence on stakeholder views of implementation of the inclusive education law (Law 54) in Portugal, the findings of the SRSP Survey and the results from the Decision-Maker Interviews were compared. Thirteen Decision-Maker Interviews were conducted with Ministry and Regional Office officials and parent and professional association leaders in May–July 2021 (see previous chapter III A).

Both the interviews and the survey used the same framework of six standards and eleven indicators for inclusive education. Comparison between survey and interview results were made by standard and indicator. Any variation by respondents' profile (e.g. school director, co-ordinator, etc.) and region (e.g. Norte, Centro) was noted.

Results are reported below by standard and indicator. Consensus and divergence between survey and interview findings are described. Areas for further exploration, possibly during the school site visits, are noted.

### **Standard 1: Inclusive values, principles and policies are shared and accepted by all.**

The decision-makers interviewed embraced inclusive values, principles and policies and shared a common view of inclusive education in Portugal. Survey respondents were also highly accepting of inclusive values and their relevance for education in Portugal, with more than 90% rating all statements as 'Highly Accurate' or 'Somewhat Accurate'. Both groups acknowledged that more work was needed to change school culture and organisation to achieve inclusion for all learners, especially those most vulnerable, but inclusive education was accepted by all stakeholders.

*Indicator 1: Inclusive education and quality education are understood by all stakeholders as inter-related.*

Both decision-makers and survey respondents saw inclusive education and quality education as inter-related. They acknowledged that inclusive education requires reduction of bias and discrimination and a commitment to ensuring the rights of all learners to reach their full potential and become a contributing member of society, regardless of their personal and social situations. 'Highly Accurate' was the modal response for all items associated with this indicator.

#### Issues for further exploration:

Seven percent of primary school co-ordinators rated the following statement: *Inclusive education is a commitment to high expectations and standards for all learners, with a focus on the most vulnerable learners*, as 'Not Accurate'. A similar pattern was seen in response to the statement: *Quality education involves equal access to classroom activities*, and to: *Quality education sets high expectations and standards for all learners, allowing them to reach their potential*. Although not statistically significant, it may be useful to follow up with school co-ordinators and EMAEIs to get more information about the extent to which high expectations for all learners guide inclusive education practices, and equal access to classroom activities is ensured at all levels of the educational system.

Across regions, respondents from the Norte and Centre regions had slightly more 'Not Accurate' ratings (chi-square  $p=.20$ ) than respondents from other regions. Although not statistically significant, it may be useful to solicit more input from those regions regarding



acceptance of inclusive values and practices and recognition of the interrelation of inclusive and quality education.

*Indicator 2: Mechanisms are in place to ensure that all stakeholders are informed about the values and principles of inclusive education.*

Decision-makers described a robust process to inform all stakeholder groups about the values and principles of inclusive education that began two years before the passage of Law 54 and included conferences, public meetings, national guidelines and support manuals, national training courses, regional support teams, and professional development from training centres, universities and teacher training programmes. Survey respondents were less positive about the mechanisms in place to inform stakeholders about the values and principles of inclusive education. The modal response for items associated with these indicators was 'Somewhat Accurate' with one exception for the statement: *Media sources covered the topic of inclusive education at the time of the new legislation*. Almost 50% of respondents rated this item 'Not Accurate', indicating that media coverage for inclusive education was inadequate.

Issues for further exploration:

Despite the generally positive regard for information mechanisms, the following statements received more than 10% 'Not Accurate' ratings: *'The inspectorate offers school clusters the opportunity to discuss the values and principles of inclusive education.'* (23% Not Accurate); *'School clusters have taken the initiative to organise informative meetings and dialogue among school leaders.'* (10% Not Accurate); *'Other professionals, e.g. resource centres, have collaborated to share information.'* (17% Not Accurate); *'Information was provided before the adoption of Law 54.'* (35% Not Accurate); *'Information has been regularly provided since the adoption of Law 54.'* (11% Not Accurate)'.

No significant differences were seen across roles or regions of the country. It may be useful to follow up with school clusters to ascertain whether opportunities to discuss the values and principles of inclusive education would be useful to promote acceptance across stakeholders. More information on how collaboration with professionals (perhaps via the resource centres) and additional information needs should also be collected during the site visits.

**Standard 2: The required resources are available and accessible to support inclusive education.**

Decision-makers believe that the spirit of Law 54 is to give schools the authority to decide what resources they need for all students to learn and develop to potential. They described a clearly defined process in which human resources were allocated nationally according to school requests (led by the school Director or multi-disciplinary team via the Regional DGEstE and DG Statistics) and other resources are provided regionally and locally. Decision-makers expressed confidence in the allocation process and indicated that resources were fairly and adequately distributed for most schools. Survey respondents were in general agreement regarding who was responsible for resource allocation (e.g. Ministry, region, municipality) and which resources are most frequently requested, but were somewhat less positive about the clarity of the resource allocation process and the



adequacy of resources. The modal response for items associated with this indicator was 'Somewhat Accurate', with the exception of statement '*External assessment is needed to allocate additional resources such as assistive devices.*' which 51.5% of respondents rated as 'Not Accurate'.

*Indicator 3: Required resources are provided and applied to support inclusive education, in accordance with schools' needs.*

Even among positively rated items, some concerns were expressed about the clarity and precision of the process. Thirty-nine percent of survey respondents rated the statement: '*There are clear policy guidelines at the national level for determining the allocation of additional resources and staff*' as 'Not Accurate', indicating need for greater clarity in centralised allocation. Similarly, 29.9% of survey respondents rated 'Not Accurate' for the statement '*Resource allocation is based upon precise needs provided by schools.*' Almost 19% of respondents rated 'Not Accurate' for the statement: '*Schools must make a request to mobilise additional resources.*' Almost 28% of respondents rated 'Not Accurate' for the statement: '*Resources are continuously monitored and reviewed.*'

Survey respondents identified the school head or principal as responsible for resource allocation (Q5) decisions (98% 'Highly' or 'Somewhat Accurate'), followed by regional educational authorities (88.7%), resource centres for inclusion (87.5%), and departments within the Ministry of Education (84.5%). Only 45.4% of survey respondents saw the municipality as responsible for resource allocation.

Decision-makers and survey respondents agreed that personnel were the most frequently requested resources, with specialist teachers (100% 'Most' or 'Somewhat Often'), therapists (100%), additional support teachers (91.7%), and professional from CRIs (86.6%) being requested most often. Technological devices (95.9%) and assistive technology (86.7%) were also frequently requested. Accessibility improvements (16.5% rated 'Most Often' and 48.5% 'Somewhat Often') were requested less frequently and were sign language teachers.

#### Issues for further exploration:

While decision-makers believe that required resources are available and the process for obtaining them is clear, survey respondents were less certain about the process and resource availability. During site visits, it may be helpful ask school directors to identify uncertainties in the resource allocation process and to list any difficulties they have experienced with resource allocation. There did not seem to be significant role or regional differences in responses to this indicator.

*Indicator 4: Provisions, availability, accessibility and efficiency of resources are continuously reviewed.*

While decision-makers felt that resources for inclusive education were adequate and available to schools, survey responses to the statement '*How difficult is it to obtain resources?*' indicate that survey respondents disagreed with it: '*Resources can be obtained easily.*' (64.9% 'Not Accurate'). Further analysis revealed that respondents felt that the resource allocation process is too long (84.5% 'Highly' or 'Somewhat Accurate') and plagued by budget shortages (96.9% 'Highly' or 'Somewhat Accurate'). Survey respondents would like more information on available resources (62.8% 'Highly' or





'Somewhat Accurate'). They believe that there are not enough support professionals available to meet local needs (88.6% 'Highly' or 'Somewhat Accurate'). Most respondents do not believe that the need for resources is linked to a lack of professional training at the school level (33% 'Highly' or 'Somewhat Accurate'). Approximately 60% believe that resources are permanently reviewed.

Issues for further exploration:

During site visits, it would be useful to ask local and regional stakeholders to suggest how the resource allocation process could be made more efficient, what information about available resources would be useful to them, and how professional training at the school level could alleviate resource needs.

**Standard 3: Schools are organised and managed autonomously to support all learners in the most appropriate way.**

Decision-makers saw school directors and the multi-disciplinary team as responsible for organising and managing support to all learners. The individualised educational plan describes the support necessary for a student to be successful. The plan is revised each year and travels with the student so that supports change as needs change, and continuity across educational levels or setting is ensured. Monitoring occurs at national (annual survey), regional (DGEstE annual plans and site visits), and local clusters (multi-disciplinary team meetings). Concerns about transition from early childhood programmes to kindergarten and from secondary to post-secondary programmes were seen as challenging. Survey responses indicated that local and regional educators held similar views, with the exception of a rather low rating of the value of inspectorate monitoring (37.1% 'Not Accurate').

*Indicator 5: Clear mechanisms to support schools and learners are in place, ensured and monitored.*

Survey respondents agreed with decision-makers and expressed confidence in their ability to make autonomous decisions and accommodate learner needs as indicated in the following statements: 'Schools are able to make autonomous decisions about curricular accommodations for learners.' (93.8% 'Highly' or 'Somewhat Accurate'); 'Schools are able to identify barriers to learning in order to consider the appropriate strategies to overcome them.' (96.9% 'Highly' or 'Somewhat Accurate'); 'Schools operate within the multi-level system of support when considering appropriate support for learning.' (93.9% 'Highly' or 'Somewhat Accurate'); 'Schools are able to decide on non-significant adaptations to accommodate individual learner needs.' (99% 'Highly' or 'Somewhat Accurate'); 'Schools are able to decide on significant adaptations to accommodate individual learner needs.' (100% 'Highly' or 'Somewhat Accurate'); 'Schools autonomously monitor the process of providing support to learners.' (86.6% 'Highly' or 'Somewhat Accurate'); 'Schools have clear guidelines and strategies to monitor the process of providing support to learners.' (86.7% 'Highly' or 'Somewhat Accurate'); 'Legislation clarifies procedures for monitoring the process of providing support to accommodate learners' individual needs.' (91.8% 'Highly' or 'Somewhat Accurate'); 'Resource centres for inclusion support schools in monitoring the process of providing support to accommodate learners' individual needs.' (86.6% 'Highly' or 'Somewhat Accurate').



### Issues for further exploration:

Across all roles and regions of the country, survey respondents indicate that schools are confident in their abilities to make autonomous decisions, identify barriers to learning, decide on accommodations and self-monitor. There was less confidence in how the inspectorate monitors the process of support provision. During site visits, it would be useful to ask school personnel how regional monitoring could be made more effective.

#### *Indicator 6: Schools are involved and manage support autonomously.*

Decision-makers believed that the legislation sets clear guidelines for supporting learners as they transition across levels of the educational system and that multi-disciplinary teams play a critical role in managing transitions. Survey respondents agree that: *'Legislation sets clear guidelines on preparing learners for the transition from one level of education to the next.'* (84.6% 'Highly' or 'Somewhat Accurate'); *'School staff from different levels of education collaborate to prepare for the transition from one level of education to the next.'* (92.7% 'Highly' or 'Somewhat Accurate'); *'School staff collaborate with resource centres for inclusion staff to prepare for the transition between education levels.'* (93.9% 'Highly' or 'Somewhat Accurate'); *'Multi-disciplinary teams play a key role in preparing for the transition between education levels.'* (100% 'Highly' or 'Somewhat Accurate').

Forty-five percent of survey respondents did not agree with the statement: *'Manuals are available and provide clear guidelines on preparing learners for the transition from one level of education to the next'*. Despite the lack of awareness of or reliance on manuals, confidence in school staff and multi-disciplinary teams' ability to collaborate among themselves and with resource centres to support transitions was high. Survey responses also indicated that transition support was important for all students, not just students with the most severe learning difficulties (52.6% 'Not Accurate'). Significant differences across roles or regions of the country were not found.

Decision-makers reported that the legislation intended that all school staff are involved in providing support for inclusive education. Survey results were generally positive but fell short of confirming that all teachers and school staff are involved. For example, 'Somewhat Accurate' was the modal response for statements concerning the question: *'To what extent do teachers and other professionals collaborate to provide individualised support?'*

'Highly Accurate' was the modal response to two items related to Indicator 6, indicating the importance of specialist teachers' work with classroom teachers and the impact of staff mobility on collaboration.

Decision-makers highlighted the importance of school leaders' involvement in managing and providing support to learners. Survey respondents echoed that sentiment, with modal responses of 'Highly Accurate' to most statements associated with the key role played by the school leaders. The majority of respondents felt that it was 'Somewhat Accurate' that *'School leaders can mobilise additional resources at class councils'*.

### Issues for further exploration:

With regard to school involvement and management of support, survey respondents expressed confidence about multi-disciplinary teams' role in transition planning but were more hesitant to report that all teachers and school staff were engaged in planning and



delivering accommodations and support. During the site visits, it may be useful to ask school personnel about barriers to full staff participation and how these barriers might be reduced. It may also be valuable to ask about how class councils function within that school; in particular, how they can be used to mobilise additional resources.

**Standard 4: Learners’ and families’ voices are respected and considered.**

Decision-makers believed that the spirit of the legislation valued and considered learner and family voices in inclusive education. They felt that the legislation clearly outlined legal and operational mechanisms to involve families in planning and decision-making regarding their child’s education, but that mechanisms for including learners themselves were less well-specified. Decision-makers also noted that processes exist for resolving conflicts and discrepancies. Survey responses are consistent with decision-makers’ perceptions regarding involvement of learners and families; however, survey respondents were less confident that clear mechanisms are in place for conflict resolution. No significant differences by role or region were identified.

*Indicator 7: Policies and operational mechanisms are in place ensuring the full involvement of learners and their families.*

‘Highly Accurate’ was the modal response for all items related to families’ and guardians’ involvement in planning and decision-making for their children’s inclusive education. Lower ratings are seen for statements dealing with learner involvement.

Issues for further exploration:

Decision-makers and survey respondents agreed on most aspects dealing with how learners and families were engaged in planning and decision-making for inclusive education. Both groups felt that legal and operational mechanisms were in place for families/guardians, but mechanisms for involving learners was less clear. On site visits, it may be useful to ask school personnel about the extent to which learners are involved and document best practices for engaging learners.

*Indicator 8: Clear mechanisms exist to resolve conflicts or discrepancies.*

While most survey respondents agreed that conflict resolution mechanisms are in place, the modal response for the different statements was ‘Somewhat Accurate’; lower than their responses to statements describing family involvement in planning and decision-making. Respondents were more confident that families/guardians can appeal in cases of disagreement.

Issues for further exploration:

While decision-makers are confident that conflict resolution procedures are in place in the legislation, survey respondents seemed less confident in that regard. It would be helpful to ask local school personnel about how conflicts are handled in their school and region and how confident they are in the effectiveness of conflict resolution mechanisms.

**Standard 5: Training and professional development are effective and accessible.**

Decision-makers described a strong country-wide programme of free teacher professional development in which all schools are required to participate. Topics are chosen for each



year. Two years ago, the training topic was Inclusive Education, focusing on the values and beliefs associated with inclusive practices. The Ministry is planning to launch a second programme on inclusive education in the near future, emphasising curriculum, pedagogy and accommodations. Training centres also offer professional development on inclusion. Teachers must participate in professional development to advance in their careers and salaries, so decision-makers were confident that teachers were participating in professional development on inclusion. It was acknowledged that most professional development was aimed at teachers and that there may be a need for professional development for other groups of professionals and staff. Decision-makers also reported that they had less information on how inclusion was addressed in programmes that prepare teachers. There are some inclusion centres funded at Portuguese universities, but the reach and impact of these centres on how teachers are prepared to teach in inclusive schools was not well known.

Survey results were mostly consistent with decision-makers' reports, with about 20% of respondents indicating that newly qualified teachers are not well-prepared for inclusion. While survey respondents appreciate the country-wide training on inclusion, some indicate that additional professional development on inclusion is needed for classroom teachers and other school personnel.

*Indicator 9: Provision of professional development concerning inclusion is ensured for all school personnel.*

Across most statements associated with this indicator, approximately 20% of all respondents did not agree that newly qualified teachers are prepared to teach in inclusive settings. 88.6% of respondents agreed that new teachers were prepared to collaborate with colleagues and other professionals.

With regard to opportunities for professional development for practicing teachers, collaborations among professionals received the highest level of agreement. Conferences, workshops and specialised programs were also viewed positively by many respondents. Mentoring, peer-learning, postgraduate programmes, and mobility training seemed to be less well known or less appreciated. Approximately 35% of respondents did not agree with the statement: 'Newly qualified teachers receive mentoring on inclusive education'. No differences by role or region of the country were noted.

#### Issues for further exploration:

While decision-makers were confident that the country-wide programme of teacher professional development on inclusion was an effective mechanism, survey respondents indicated the need for greater emphasis on inclusive education in programmes that prepare new teachers. Survey respondents rated collaboration among professionals as the most prevalent opportunity to learn about inclusive education. It may be useful to ask school staff (including teachers, but also therapists, staff, and other school employees) to identify the most important topics for training and the most desirable formats for delivery.



*Indicator 10: School leaders promote professional development opportunities in inclusive education.*

Decision-makers were confident that school leaders actively encouraged teachers in their schools to participate in professional development in inclusive education because the country-wide programming was free, teachers are required to take professional development to advance in their career, and it was in the best interest of the school to have teachers well trained in inclusion. Training centres and regional inspectorates work with school directors to develop training plans for each school. Decision-makers were aware that most professional development in inclusion was targeted to teachers and that other professionals might lack sufficient opportunities.

Survey responses indicate support for professional development and agree it should be monitored. Findings indicate that all school professionals are invited to professional development opportunities on inclusive education, but teachers are more likely to participate than other professionals. About one-quarter of the respondents did not confirm the existence of professional learning plans. A similar number rated 'Not Accurate' for the statement: '*Teacher educators largely participate in professional opportunities for inclusion*'. Differences by professional profile or region were not evident.

Survey respondents expressed that the role of school leaders is crucial in planning professional development and mentoring school staff on inclusion. There was very high agreement that capacity building for inclusion and setting expectations for professional development are central to the job of school leaders.

Issues for further exploration:

During the site visit, it may be helpful to clarify the particular ways in which school directors develop their training plans and how they work with various professional development providers to meet the training needs of their staff. It would be helpful to examine some of the individual and school professional learning plans to ascertain their content and the extent to which all staff needs are addressed. It would be informative to determine from which teacher training programmes each school hires graduates and to ascertain school satisfaction with new teacher preparation at those institutions. Gaps in training should be identified.

**Standard 6: Success and certification.**

Decision-makers cited visits by the Inspectorate General and the annual survey conducted by the General Directorate for Statistics as the primary legal mechanisms to ensure learner success. Locally, the school director, multi-disciplinary teams and General Council/Assembly were seen as responsible for monitoring learner outcomes. Most assessment and success metrics are public and available to parents and other stakeholders. Law 55 requires curricula and competencies to be more flexible, resulting in a personalised diploma. This will increase the likelihood of success for all learners but will present challenges to schools in terms of implementation and accountability.

Survey results indicate generally positive regard for assessment and evaluation processes in inclusive education, with a modal response of 'Somewhat Accurate' for most statements. No significant differences by role and region were identified.



*Indicator 11: Policies and operational mechanisms are in place to ensure success for all learners.*

Survey respondents were very confident that ‘*Schools use on-going assessment to improve learning and participation*’, with 95.9% scoring ‘Highly’ or ‘Somewhat Accurate’.

Respondents were aware of the challenges associated with implementation of Law 54 and expect that it will improve assessment practices and success for all students. One area of concern was the extent to which learners are involved in the assessment process, which 13.4% of respondents rated as ‘Not Accurate’.

Survey responses were generally positive about the extent to which all learners have access to results and certifications. Respondents are hopeful that Law 54 will provide additional clarity to schools on how to achieve those goals. There is agreement that schools must work to ensure that all learners reach their full potential and resolve difficulties that prevent all learners from achieving success. Approximately 20% of respondents disagreed that schools provide everything necessary for all learners to succeed, that learners are invited to discuss issues concerning their education, and that families are well-informed and have opportunities to share opinions regarding their child’s certification.

#### Issues for further exploration:

Schools understand that Law 54 will require more curricular flexibility and different assessment practices to document how each student is achieving the goals of their personalised diploma. They are eagerly awaiting more information and training opportunities on the new policies. The site visit would be a good opportunity to ask local school personnel to identify information and training needs to implement the new law, especially those related to assessment policies and mechanisms.

Site visits could be used to collect information on the biggest challenges imposed by Law 54 and its requirement for a personalised diploma. Suggestions for how to increase learner and family input should also be solicited.

#### **Impact of COVID-19 on inclusive education in Portugal**

Decision-makers acknowledged a negative impact of the COVID-19 pandemic on inclusive education in Portugal, especially during the first lockdown in spring 2020 when schools were unprepared for the abrupt transition to virtual learning. In the second lockdown (autumn 2020), decision-makers felt that special provisions were made to keep the schools open for the most vulnerable students, and internet access and equipment was provided to families in need. It was recognised that many students suffered learning loss during the pandemic and recovery plans are in place.

Specific concerns were raised regarding Standard 6: Success and certification, and that an economic downturn might affect students’ longer-term employment and career outcomes. Survey respondents shared a similar perspective, with ‘To Some Extent’ serving as the modal rating of the impact of the pandemic on five of the six standards. The following statement: ‘*Provision of equal opportunities for all learners.*’ was perceived to have been most affected, with a modal rating of ‘Very Much’. No significant differences by region or role were found.



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Survey respondents acknowledged the efforts of school staff to implement inclusive education, with modal responses of ‘Highly Accurate’ for most statements related to the question *‘How has the pandemic had an impact on the implementation of inclusive education?’*. Of particular note, only 3% of respondents disagreed with the statement *‘During the pandemic and school closures, support services have reached out to learners who need additional support.’*. Respondents reported that multi-disciplinary teams have continued to collaborate to provide services during the pandemic and schools have continued to support family engagement. Two statements, *‘During the pandemic and school closures, meaningful learning opportunities have been offered to all learners.’*; *‘During the pandemic and school closures, school teams have maintained learners’ involvement in their educational planning.’*, had modal ratings of ‘Somewhat Accurate’, indicating that learners’ engagement in educational planning and meaningful learning opportunities may have been more negatively affected by the pandemic than some other aspects of inclusive education. While some positive impacts of the pandemic were noted (*‘During the pandemic, new virtual opportunities for teacher professional development have emerged.’*), respondents believe that inequality of access to the curriculum has increased and there is an increased need for learner support as a result of the pandemic.

Issues for further exploration:

Site visits are a good opportunity to talk with school personnel, families, and learners about the impact of the pandemic and school closures on inclusive education. Of particular interest are the new opportunities for professional development, new strategies for offering support for family involvement, and increased resource needs associated with the pandemic. It would be helpful to get information on effective strategies for learner support that were developed during the pandemic.

### **III C – Fieldwork**

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#### **Analysis of school cluster visits**

A team from the Agency visited nine school clusters to validate and refine the standards-based system to monitor the implementation of Law 54 on inclusive education. Visits included site visits of pre-school, primary and secondary school(s) with three focus groups: one focus group included directors, co-ordinators, support professionals, non-teaching staff and parents, the second involved teachers, and the third, learners. The first and second focus groups followed a semi-structured approach, addressing each of the standards to be validated for the monitoring system separately. Focus groups with learners followed an open guideline based on three topics only, to encourage all learners to speak about:

- inclusion in/and daily school life;
- suggestions for improvement;
- the impact of COVID-19.

The analysis is based on the aggregated notes of the site visits and focus group discussions. Five out of nine school cluster visits had Portuguese note-taking of all focus groups, which were aggregated and summarised in English by the visiting Agency team.



Four school cluster visits had English note-taking of the focus groups based on simultaneous interpretation. All English focus group and summary notes were used for the analysis. All notes were ordered by each of the standards and along four perspectives: directors/co-ordinators, teachers, parents, and learners.

The cross-analysis findings are presented by the standards and indicators designed for the monitoring of the implementation of Law 54. Perspectives of focus group participants are described, with commonalities, differences and unique responses noted.

**Standard 1: Inclusive values, principles and policies are shared and accepted by all.**

*Indicator 1: Inclusive education and quality of education are understood by all stakeholders as inter-related.*

Among professionals, inclusive education's values and principles are well understood. Directors, co-ordinators and teachers were able to express what inclusion means to them and what the benefits can be for all learners, school staff and society. Inclusive education is seen as education for all, in one school expressed as '*knowing, working with and supporting all learners without labelling them*'. An inclusive policy seems to be widely accepted because it is based on the values of equity, diversity, respect, well-being, citizenship, belonging and collaboration and linked to success for all. These values are stated clearly several times and seem to be broadly shared.

Many of the visited school clusters are characterised by a socio-economically or socio-culturally challenged context in which multi-lingualism and multi-culturalism are a reality. In these schools, inclusive education as defined in Law 54 is seen as an opportunity to achieve success for all. School staff generally believe that inclusive education will lead to a higher quality of education, but this will require new ways of teaching and collaboration. Both within-school processes, such as strong leadership and management of the school cluster, and a broader support network are needed. The whole school needs to be open to change.

Inclusive education is an important, on-going topic among colleagues, sharing values, practice and needs. Although staff members express a strong commitment towards the values of inclusion and positive relationships among teachers and learners exist, in some schools a transition is still taking place from a more competitive culture towards an inclusive culture of true acceptance and equity for all. In this respect, inclusive education's acceptance and beliefs are very much linked to the organisation of learner support and support for teachers, as outlined in Standard 3. This relationship emerges as a way of illustrating how values and principles are put into practice by teachers and the broader school staff, underlining the adoption of Law 54's values, principles and policy. But it also reflects concerns about the way policy allows schools to adhere to these principles and to develop a true school for all as intended.

*For all students, those with selective and additional measures, and those who have differentiation through universal measures, the motto exists not to leave anyone behind, to maximise each child's capabilities, academically and socially.*





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*Inclusive schools are a reality, but it's not the same as a school for all, there are still things missing for more complex needs, e.g. for learners with more mobility needs.*

Also, for parents and learners, inclusive education is becoming a reality. Parents express gratitude and relief about the school's acceptance of their child, stressing the opportunity for learners with significant needs and their peers to have daily contacts with peers and to participate. Others mention the absence of racism and the focus on well-being. Learners acknowledge the openness and respect of the school. When asked about bullying, they share personal experiences and stories heard from others. These reflect concerns about cliques and bullying, but also trust regarding its management and outcome. Within-school approaches to deal with cliques or bullying seem to be positive and trustworthy for young people and aligned with the values of inclusion. Inclusive education is acknowledged as a positive life experience for all. Both parents and learners express trust and a positive relationship with school staff, which is often compared to former experiences of non-inclusive schooling.

*For my child, it has been wonderful. Through this school, he found teachers who don't put him aside. They do everything to include him. In this cluster, with these teachers, all possible support is provided.*

*I will be able later to relate to people with emotional problems.*

In general, staff adhere to inclusive education's values and principles and show trust and belief in higher quality education if schools are organised to accept and support all. The relationship with quality education emerges as conditional. Values and principles are reflected in a commitment to act, but for the full adoption of inclusive values and principles and their enactment towards quality education, support and management of support are essential.

*Indicator 2: Mechanisms are in place to ensure that all stakeholders are informed about the values and principles of inclusive education.*

In contrast to the rich dialogue among professionals about the values and principles for inclusive education, the topic of being informed about the values and principles is raised to a limited extent. Teachers mention the need of being informed and include learners as stakeholders in information processes regarding inclusive values and principles. In addition, teachers mention the need to align the school cluster's policy to the values and principles. Co-ordinators and directors illustrate how training is organised to inform staff about the law. However, as an information mechanism, this training is not specifically focused on the values and principles of inclusive education but addresses a more general need to be informed on all aspects of Law 54. There is an assumption that initial teacher education prepares teachers on the topic of values and principles of inclusive education, while in-service training must focus on clarity of the law, e.g. regarding its focus on 'everybody' and/or learners with special educational needs.

*Documents, all structures and pedagogical councils must all be aligned to inclusion in the same way, to include ALL students.*



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*At the start of Law 54, as a joke, we had workshops 'Who's afraid of the 54'. But there is still need for more informal professional learning in teams, for more discussions, to listen to each other. There is not a lack of teachers, there is a lack of time for permanent professional development.*

Parents and learners do not mention the need of being informed on values and principles of inclusive education that guide the school cluster's policy. This may be due to the fact that representatives of parent and student organisations attended the focus groups, who may be more closely involved in the school's pedagogical projects. Some teachers mention that the language used may often be too difficult for parents to understand what inclusion is about. They stress the need to inform parents properly.

This limited attention for information mechanisms regarding values and principles for inclusive education may be due to the challenging contexts of the school clusters visits, where diversity is already a reality and understanding values and principles is regarded as a 'natural' process of learning while putting policy into practice. Still, professional development needs are also mentioned regarding awareness-raising for diversity, in particular for those who are hard to reach and show resistance against the view underpinning Law 54.

**Standard 2: The required resources are available and accessible to support inclusive education.**

*Indicator 3: Required resources are provided and applied to support inclusive education, in accordance with schools' needs.*

According to school cluster directors, co-ordinators and teachers across schools, the provision of technical and other material resources to support quality education in schools has been appropriate and satisfactory in recent years. The visited school clusters have well-equipped and newly adapted spaces for multiple educational activities, e.g. leisure spaces for youngsters, outdoor sport facilities, a theatre room or radio studio, resource rooms for learner support, libraries, and new technology. These resources allow schools to develop new teaching methods for all, as well as appropriate support for learners who have been allocated universal, selective or additional measures. As indicated by the teachers, *'it helps to be more creative'*. However, as a reminder, it is also mentioned that a learning process is required to make appropriate use of the available resources.

*Maybe resources are present, but this does not guarantee that all learners are reached.*

Teams also value the HR-allocation by the Ministry, in particular the allocation of psychologists and the provision of tutorship programmes. However, given the increased need for mental health support, one school cluster team stress the need for more school psychologists and nurses. Another school cluster indicate that a higher allocation of teachers was due to COVID-19 to deal with the exceptional situation and needs.

More generally, directors, co-ordinators and teachers indicate that the allocation of subject teachers and SEN teachers is insufficient to provide the classroom support needed



to implement inclusive education. Classroom support is seen as important and is well-adopted across schools as a response to the new legislation.

In order to overcome the lack of HR mentioned, directors searched for additional external support for learner needs. For instance, speech therapists and social workers visit the school or provide learner or social support after school, in collaboration with the municipality. This collaboration is regarded as being similar to how the CRI operates. This support is well received, as it compensates to some extent for a shortage of support teachers. In addition, operational assistants are provided to schools by the municipality, mostly for classroom learner support, for support for extra-curricular activities and support in learners' free time during the day. During the school cluster visits, it was clear that operational assistants working as non-teaching staff were broadly relied upon. However, due to COVID-19, not all had been present in recent months.

*Working with additional human resources from the municipality brings the community into the school.*

Directors mention that they need to be proactive to search for additional resources. For instance, it is their initiative to apply for external programmes such as the Ubuntu-programme or Erasmus projects.

*Schools need a proactive attitude to consolidate responses and to compete.*

In the focus groups, parents joined the directors' and co-ordinators' dialogue. As issues were largely raised by the professionals, some parents confirmed that more resources 'would always be welcome'. But in general, parents did not complain about a lack of professional support or ask for more human resources. Instead, they stressed how supportive teachers are.

In general, resources are used in accordance with the needs that arise at the learner level and at the school level. At the classroom level, there is a demand for more HR. Strong support is also provided by the local community.

All staff members value the availability of resources but also stress the need for more HR in order to build collaborative and appropriate support for all learners. More HR are essential, because classroom support stands out as the preferred way of realising inclusion. This finding highlights the link between perceived needs of HR and support organisation (Standard 3).

*Indicator 4: Provision, availability, accessibility, and efficiency of resources are continuously reviewed.*

School cluster teams are clear about the needs that stand out the most. This shows permanent reflection and a monitoring approach regarding the provision, availability, accessibility, and efficiency of resources.

Key issues that were found across schools are:

- Lack of time and credits allocated.
- Absenteeism, or a lack of regular attendance by some learners. This makes teacher allocation very unstable, while it is needed most when these students return, or in



case a new professional programme is applied for. Absenteeism of (specific groups of) learners requires a more flexible system of HR-allocation.

- Lack of specialist teachers and non-teaching staff for some groups of learners, e.g. students with severe disabilities. According to teachers, there should be full-time assistance for these students:

*A student with severe needs 'weighs' 2.5 students, but in fact this student is worth a whole class, a full-time person, someone who can be with the teacher all week.*

- Lack of health workers. This is mentioned in school clusters where health workers seemed to be more easily allocated in the past.
- Instability of staff or high rotation of teacher staff. Beginning teachers are sent to schools they don't know, and some excellent teachers soon leave when other opportunities occur at a better distance from their hometown.

*These contracts, with constant mobility of teachers, are a barrier for our work. Stability is needed, for continuity of work for a longer time, to ensure quality.*

- A lack of autonomy to hire (support) teachers. Directors regard themselves as those who know the required profile of the teachers needed in the specific context of the school cluster, but they are not in a position to recruit them. Recruitment by the school director would help to fit learner support and assistance to the needs of the school and to get an idea of hired staff's motivation and sensitivity.
- Need for a better qualification and professional development of operational assistants.

Some directors and co-ordinators suggest that there is some autonomy to manage HR or to be creative with resources, e.g. to change the number of classes. However, the need for autonomy and flexibility in hiring teachers and other staff in order to enhance stability of staff stands out in the professionals' responses regarding available and appropriate HR for inclusive education. This issue indicates a significant concern among school cluster directors and co-ordinators about the accessibility of HR to overcome the uncertainties regarding continuity/mobility of staff.

In general, there is an awareness of the need for permanent revision and monitoring of resources available according to the school cluster's context. Each context has its own challenges, and support must be organised in a flexible way.

Reviewing and monitoring resource availability and accessibility seem to be outside school clusters' control. Moreover, the estimation of what is needed is linked to the organisation of support (Standard 3) and not to learners' needs only. Schools prefer a certain organisation, e.g. classroom support, and wish to build inclusive education accordingly. In this model, accessibility is linked to the contextual organisation of support.



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**Standard 3: Schools are organised and managed autonomously to support all learners in the most appropriate way.**

*Indicator 5: Clear mechanisms to support schools and learners are in place, ensured and monitored.*

Across all school clusters, learner support is regarded as a shared responsibility. Support is understood as teamwork, it is part of the paradigm shift towards inclusive education.

Support is organised in different ways. Directors indicate that it is organised according to the resources provided:

*Since we cannot choose the personnel, we need to arrange the school according to who is allocated to the school.*

A global picture of how support is organised was given by the directors and co-ordinators. EMAEI co-ordinators organise and monitor the support, based on teachers' first indication of needs and further cycles of evaluation. Class councils take place and documents filled in by teachers are analysed by the EMAEI. This leads to proposals for universal, selective and additional measures. At the end of the year, measures are evaluated and transitions are discussed. In pre-school and primary school, to shorten the time to wait for a decision, interventions are broadly promoted. Larger school clusters have installed sub-teams of EMAEI, to have nearby follow-up and support for all teachers. CRI's are well integrated in the dynamics of the clusters. They work closely together with the EMAEI's and adapt interventions to the context. CRI's value this collaboration for its efficiency and as a means to facilitate inclusion.

*We need to have collaborative teamwork; we can't keep coming back forever.*

Several school clusters that were visited are a reference school for specific learner support, e.g. for learners with Asperger, for visually impaired students, for bilingual education, or for learners with multiple disabilities.

Co-teaching is the preferred way of supporting all learners. It starts from pre-school on, and provides mutual support to make the curricula more flexible. The frequency and availability differ. SEN teachers work with classroom teachers to adapt the curriculum. For learners who require Portuguese as a second language, it is mentioned that it is unclear whether a more separate approach can be taken.

In addition, schools have centres of interest, co-operative teaching, peer support and mentoring, tutoring and, for learners who live in a socio-economic disadvantaged situation, non-formal education and training programmes. Directors and co-ordinators have also developed strong partnerships with the municipality for social support and need to rely on mediators to strengthen the relationship with Roma families.

Teachers are committed to the support organisation as outlined above. In particular, their role in the model of universal, selective and additional measures is well understood. They stress how universal measures offer the possibility to formally implement measures that previously existed in a more informal way. They also value how universal and selective measures help students not to be excluded from the classroom. However, they mention



the workload of bureaucratic reports that comes with it, impeding sometimes selective measures to be implemented.

*Universal measures may be stretched sometimes.*

*What legislation asks is to reflect, and this can be done without so much bureaucratic overload. Still, it's an added value for those who arrive.*

Also, additional measures cannot always be fully implemented, because more teachers are needed, e.g. SEN teachers do not always have enough hours to attend to learners with multiple disabilities. Differentiation is seen as a universal measure, but for teachers who work alone in the classroom, it is difficult to differentiate. Having more support teachers or reducing class size should be part of universal measures. Differentiated learning is regarded as more complicated in secondary education as learners need to be prepared to pass the national exam. Priorities lie in the 1st and 2nd cycle, to move to secondary education. Law 54 does not fully address the need for support follow-up in secondary education.

In general, teachers feel supported in their work by the EMAEI, who start support strategies as early as needed. In addition, co-operative learning, peer support, mentoring, tutorship programmes and innovation projects are mentioned as processes supported at the school level. Some teachers regret that tutorship is no longer provided as it was in former legislation. Teachers also express concern regarding big classes, absenteeism, drop-outs, follow-up on medical issues and teacher competences.

Parents show appreciation for the work of teachers, SEN teachers and the school's support organisation. They understand that each teacher has their own way to reorganise the classroom context, but in general, measures are being framed in a good way.

*Teachers do wonders.*

Regarding support, most learners are positive. They talk about positive teacher–learner relationships, feeling supported by teachers when it is needed. They also appreciate being together in class.

Support is central in the school clusters' organisation and starts in daily teaching practice. It is monitored at the learner, classroom and school level. However, teachers mention that not all measures can be fully implemented. The organisation of support systems and the integration with classroom work requires a long-term process.

*Indicator 6: Schools are involved and manage support autonomously.*

Among school staff, the management of support is a shared topic.

Directors state that, according to the law, 50% of the measures can be decided upon autonomously by the school. As an example, co-teaching is often chosen as a universal measure, not just for selective measures, timetables can be changed, or pedagogical teams are formed. It is felt that more autonomy should be allowed, e.g. 60%, to fully make use of and organise inclusive support according to the school cluster's context.



Directors and co-ordinators consider different ways of organising school support and monitor what works best at the school level. For instance, learning support has decreased in one of the larger school clusters, because of changes in the timetables, moving towards universal measures.

This requires strong management and communication among all staff, including new staff to facilitate their integration in school. In particular, the EMAEI co-ordinators need management skills in order to support teachers, mediate with parents and raise awareness for inclusion.

*EMAEI is the head of an octopus ... The work is where the action is, in the field, otherwise policy has little value if it is not responding to the field.*

Teachers talk about creative ways of managing support, leadership and entrepreneurship, in order not to exhaust all resources. Some teachers stress the need to adopt new ways of teaching, and not to focus on the lack of resources for support.

*For quality education and new ways of teaching, there is more needed than just chairs and tables.*

More specifically, teachers must be able to ‘*decide in the moment*’, and teams need time to rethink how to work collaboratively, to prevent reverting to ‘*a child should have full time support, because that’s not inclusion*’.

For others, more guidance is needed to fully implement the measures of Law 54. Stability of the EMAEI team is mentioned as an important factor to manage support effectively.

For parents, the management of support is less clear. In particular, it is mentioned that the allocation of support is not always transparent, e.g. why some students still receive support when they don’t seem to need it any longer, while others would need more. Learners did not mention support management in general, but some mention the lack of support during COVID-19.

#### **Standard 4: Learners’ and families’ voices are respected and considered.**

*Indicator 7: Policies and operational mechanisms are in place ensuring the full involvement of learners and their families.*

*Education is done with parents and learners; well-being is a shared responsibility.*

Across the school clusters, policy, and operational mechanisms are in place to ensure the involvement of families. Student participation is not equally ensured.

Directors and co-ordinators underline formal mechanisms to involve families, such as parent associations and school councils. Larger school clusters have several parent associations, to represent all families. Also, all parents are invited for regular parent meetings, either at the school or online. In the pandemic, there were also courses for parents on decision-making regarding professional courses in secondary school. Parents of learners with additional support measures are closely involved in their child’s follow-up. In some cases, they can be non-permanent members of the EMAEI.



From the professionals' perspective, this is how family involvement is primarily understood: to be involved in the child's efforts in schoolwork and to support the child and the teacher(s) in this process. Therefore, schools also have informal mechanisms to enhance family involvement, e.g. parents can be invited for school and classroom activities, such as multi-cultural activities, or open school days. In many schools, there has not always been an active involvement of families, and not all families were reached. But in the pandemic, this improved. Parents asked co-ordinators for strategies to support their child's learning and collaborated with the professionals in school.

*Collaboration and direct work with the parents make them accountable.*

In general, professionals see more family involvement in pre-school and primary schools than in secondary education. Especially in pre-school, this comes naturally. From secondary school on, a more direct representation of learners seems to be expected. Formally, there is student participation in student councils. However, one school stated that participation in a student council is '*according to their ability*', and some schools don't mention student councils. The topic of listening to the voice of learners is also mentioned as being part of the Citizenship programme.

Parents set out their role in a broader perspective. For them, family involvement is about openness, communication, partnership and representation. This applies at the individual level, at the school level and at the community level.

*It's my duty as a mother to defend the inclusion of my child; I want to see him happy.*

*As a mother, I understand that in school the school is responsible, this is not a real partnership. But sometimes the school is a hurdle, and we will speak on behalf of the well-being of our child and of the other children.*

*Also, for parents who do not have a diagnosis of their child, partnership is needed, from a multi-cultural perspective too. It is necessary for the parents to see them represented.*

Parents of children with a disability also point out what is missing in formal and informal mechanisms. For instance, schools could do more effective awareness-raising among teachers regarding the communication with parents on inclusion. In pre-school, awareness-raising on inclusive education seems to exist, but this is not the case in primary and in secondary education.

*It worries us that there are parents who see inclusive education as a burden instead of a relationship of respect. These parents become the first opponents against inclusion.*

In some cases, parents are partners of the school cluster in advocating for services at the community level, e.g. for transport.

*Parents have the right to 'push' here for specific needs or questions of transition, such as professional learning needs.*





Finally, learners expressed their view on student participation. Those who are a member of the student council explained its role: to listen to students, to show everyone can speak out, including the Roma students and other students from a minority group, to understand concerns and solve things. They will raise what more is needed to enhance student involvement. Representation on the school board is another mechanism that gives learners the opportunity to say what is needed, in open communication with teachers and the director. In general, learners feel that teachers and the director can be easily reached. However, in some schools, there are fewer opportunities for learners to be actively participating or learners are not aware of the existence of a student council.

*We'd like to take on more, put posters in the school for some ideas, but we never saw any ideas put into practice.*

While parental involvement is well monitored – although it is more narrowly understood than the full partnership it could be – there seems to be little guidance regarding the integration of the learners' voice in schools. Informally, the involvement of learners seems to be integrated in daily school life, reflected in openness and accessibility of teachers, but formally, more attention may be required for student representation and engagement.

*Indicator 8: Clear mechanisms exist to resolve conflicts or discrepancies.*

Many groups of parents aren't easily reached. Schools are looking for ways to involve all families, but more national promotion through social media may be needed to inform families of the legal obligation of parent involvement. Schools cannot do this on their own or cannot oblige parents.

*We must disturb parents a little.*

Communication with the Roma community may be needed indirectly, through mediators who are closer to the community, if parents cannot be reached.

Directors, co-ordinators and teachers show understanding and sensitivity for the social challenges that many families are facing. Considering a high level of illiterate parents, there is a need for oral information, e.g. to speak directly to the parents when they are at the gate. It is suggested also that policy would simplify the forms, in order to provide a more accessible language for parents. When decisions must be made with more impact on school life, e.g. with regard to additional support, co-ordinators have learned to always listen to the family, to value their opinion and to build on the previous relationship. Sometimes, parents are pushing for additional measures. This is legitimate and reflects their concern to reach their child's full potential. According to the law, it is not necessary for parents to agree on all measures, but on measures such as speech therapy or psychology and on mentoring activities, it is. They need to be involved regarding all measures to support learning.

Parents' individual experiences differ on this matter, although in general, parents appreciate the way the school informs them, communicates and solves problems. There is openness from the schools. Regarding the language used, there is a demand for empowering language. It is also stated that documents are not always presented to the parents and some decisions are made without consent. For instance, while opinions may



differ on classroom participation or on certification, there still seems to be a mutual understanding.

*Teachers spend more time with our children in school, we cannot contest what teachers say.*

Learners added examples of conflicts or discrepancies, e.g. in cases of bullying, which are resolved effectively by teacher support. Learners feel they are always heard in cases like this.

To acknowledge specific risks and concerns regarding family and learner involvement, separate hearings/focus groups of parents/families and learners may be needed, beside the perspective of staff members. This was not the case in the focus groups organised at the school cluster visits.

### **Standard 5: Training and professional development are effective and accessible.**

*Indicator 9: Provision of professional development concerning inclusion is ensured for all school personnel.*

Directors and co-ordinators are well aware of the needs for professional development concerning inclusion. More generally, teachers express the need for reevaluation of the profession when stating,

*It is important to dignify the schoolteacher's profession and all school professionals. Only then will parents come to the school.*

With regard to the content, first priorities named by directors and co-ordinators are training on barriers for learning, new technologies, educational methods and effective implementation. The pandemic also highlighted specific training needs, such as multi-lingualism and behavioural issues. Teachers add to this list the need to have more training on new curricular areas, new teaching methods, enrichment activities, new perspectives of evaluation, awareness-raising for inclusion, but also topics of SEN, health and the understanding of different communities. For SEN teachers, CRI staff and psychologists, courses on new learning, teamwork and leadership skills are suggested. Teachers also suggest including parents in training on distance learning.

*New technologies still require professional development. We attended some training on these skills, it empowered us.*

Across all school clusters, there is a clear demand for professional development for all staff. Although there are some recent changes acknowledged, initial teacher education (ITE) is regarded among professionals as not sufficiently preparing teachers for inclusion. According to some, ITE focuses on labels and specific challenges more than on inclusion and equity. Directors mention partnerships with local/regional ITE institutions to work on inclusion and difference as well as on contextual knowledge. Teachers add that ITE should prepare all teachers for a new reality by focusing on UDL and by raising awareness for inclusion. This suggestion is motivated by teachers' self-reflection, understanding that beyond ITE, professional goals may be different.



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*We try to protect ourselves a lot, and supervisions may have another intention, of how to put it into practice.*

In addition, induction is organised at the school cluster level for new colleagues, using scripts, protocols, mentoring and training hours for immediate preparation. Moreover, continuous professional development (CPD) for all professionals is broadly illustrated. Across school clusters, two strands of CPD stand out. First, teachers are offered or required to take formal courses, e.g. 50 hours of courses/year. This may be organised in partnership with local training centres and leads to a certificate. It focuses on priorities discussed with the school cluster(s) at the beginning of the school year, such as Citizenship and Development and UDL courses. Second, internal training sessions among colleagues are organised in schools and school clusters. Staff regard these non-formal meetings as the most useful and valuable, because sessions can be organised in a flexible way and offer responses to unpredicted challenges in the school or community context. SEN teachers are considered as reference teachers to train class teachers, for which time is reserved in the teacher's timetable or inclusion networks exist. School clusters also participate in European programmes that relate to inclusion. Teachers stress that they need more practical professional learning opportunities instead of theoretical courses, like working groups to implement ideas.

*We need training in the field. Theoretical elements are important, but practice is the most important learning that I had, to understand in a specific situation what a student needs, what to do.*

Directors add that a combination of both strands of professional development is important for teachers, because not all are prepared for diversity. Conceptual learning about inclusion is important, to speak with the same voice. School clusters have training plans for teaching and non-teaching staff that have to be approved by the school cluster's board.

A high priority must be given to the professional development of auxiliary staff/operational assistants. They have a crucial role in the implementation of inclusive education, but a profile and qualification are missing. Some schools work with external organisations to offer training of assistants, e.g. for sign language or conflict management, but this offer is followed on a voluntary basis only. More systematic professional development of assistants is needed.

Taking into account the voice of the parents on this matter, professional development regarding the language of difference is mentioned as a crucial topic.

*We need some training both with regular and special education staff for a change towards empowering language.*

*Indicator 10: School leaders promote professional development opportunities in inclusive education*

School leaders promote professional development in several ways, as indicated above. But in spite of a broad offering of professional learning opportunities and initiatives, not all professionals are reached.



Directors mention that a high number of teaching and non-teaching staff are close to retirement, others do not agree with the principles and values of Law 54. The position of school cluster directors is to encourage them to participate, without forcing them. The main barrier lies in not being able to recruit staff autonomously. They need a strong profile of teachers, with commitment and passion, to monitor learners and have permanent evaluation. Training plans must include more interactive learning, and more valorisation of learning for teaching and non-teaching staff is needed.

With regard to Law 54, one school cluster illustrates how everyone was involved in professional training.

*At the start of Law 54, as a joke, we had courses/workshops “Who’s afraid of the 54?”. But there is still a need for more discussions, to listen to each other.*

Other directors indicate that they had meetings on Law 54, clarification sessions and cases, involving the whole school cluster. They learned on their own, and more was planned. But the pandemic stopped it.

For teachers, the main barrier is time management. Internal training is important, but time is missing to discuss educational strategies, to monitor and evaluate practices, or to have short-term training with SEN teachers in the classroom. It’s a matter of management and organisation of resources, because there is a huge potential in the teams.

*It’s crucial to have people in the school, to dare to do different, a group of people with whom we can try and reflect and see what effect it has. Not going back to the same old ways.*

## **Standard 6: Success and certification.**

*Indicator 11: Policy and operational mechanisms are in place to ensure success for all learners.*

To ensure success for all learners, Law 54 moves towards new assessment and certification approaches in line with the principles of inclusive education. Across school clusters, practices differ. Schools also look differently at the meaning of assessment at the student and at the school level.

Traditionally, evaluating progress achieved by learners is aimed to guide them to higher education or to prepare them to find a job. Directors and co-ordinators clearly explain that the focus of evaluation has shifted towards a broader picture, as described in the Student Profile and the Citizenship and Development programme. This holistic view allows for differentiation and flexible curricula as described in Standard 3. It requires formative assessment above all to monitor progress. In primary schools/1st and 2nd cycle, this view seems largely adopted, but from secondary education/3rd cycle on, in several school clusters national exams still carry the heaviest weight of learner assessment.

In particular in school clusters with a high level of multi-linguistic and socio-economic challenges, school staff acknowledge that social outcomes are as important as academic success. Before anything else, they are committed to ensure a higher attendance in school of those learners who risk dropping out of school. Other schools show concerns for achieving or retaining high school results in order to facilitate learners’ transition to higher



education and/or to enhance approval for further educational changes by the school board. But they still assure that all learners will have a place in school. For those who do not succeed on the national exams, as a response directors mention curricular differentiation, guidance and professional orientation. Retention is mentioned, but it is unclear to what extent it occurs. Directors also search for opportunities to offer more vocational learning routes.

At every decisive moment of transition to another cycle, a picture is made for the next year, based on formative and summative assessment. Psychologists provide professional orientation. One cluster mentions the organisation of a fair with all professional schools in the region and teams of different professional areas, to talk about professional lives and to enhance the transition to the next level.

Examples of formative approaches in schools are the use of self-evaluation of learners through checklists, tutoring, feedback on presentations and on adapted evaluation. Co-ordinators state that more feedback is needed for homework. Some school clusters focus mainly on summative assessment, but generally, assessment is described as an on-going process of feedback and accountability, including learner involvement, behaviour and family commitment. Professional development for formative assessment, as mentioned in Standard 5, is very much needed according to directors. One director explains how it is approached:

*We have training every year in this cluster, we investigated a lot into formative learning, to give feedback to the students, to identify what they achieved, to check the causes, so that they can improve. The essence is learning, to be able to improve, to progress.*

Still, summative assessment and in particular external evaluation is different. While teachers are moving towards evaluation that is tailored to the student, taking into account measures that allow them to progress, there is only one form of a national exam. Tests are very formal and differentiation can be difficult.

From a learner's perspective, in secondary schools, major concern is expressed regarding tests and national exams. Learners indicate that timetables are heavy, and homework and tests are very demanding. After the pandemic, the pressure for academic achievements is becoming very high in some schools. They appreciate group work and group assessment very much.

Directors and co-ordinators show awareness of the complexity of the curriculum and the pressure of national exams. They acknowledge that they are in a process.

*The school tries to de-mystify the national exams. To be prepared, we provide learners with self-learning and self-evaluation materials.*

Generally, the assessment approach of Law 54 is well adopted across the visited school clusters, but in secondary schools, in particular in more competitive school cultures, a higher focus on summative assessment may impede the full implementation of policy mechanisms towards success for all.

Certification at the end of compulsory education is perceived as a right.



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*We work towards the profile of a student of secondary education, for all, no matter whether he will go to higher education or professional education, whether he will have autonomy or can study.*

Certification must mirror the skills that learners develop. Directors and co-ordinators explain how certificates also give transcripts of additional measures and specific competences of learners. The form of the certificate should be adapted to be able to include this. One director suggests that certification of non-formal learning should be possible, e.g. the learning that took place in community service.

*A certification must value this working towards autonomy, values, humanity. It should not only reflect academic knowledge, but also citizenship and solidarity. This is what the profile is working toward'.*

Among teachers, there is some hesitation. They believe that additional measures are sometimes allocated for too long, disadvantaging learners when measures are needed for the final certificate. Also, some find it difficult to award a certificate if learners have not regularly attended school. Absenteeism is an issue with regard to the adoption of certification for all.

For parents, too, the meaning of certification differs. For some, it is symbolic and not with real value for professional opportunities, e.g. for learners who will not be autonomous in adult life. For others it is very worthwhile. Some parents express concern regarding the practice of signing for certain measures because it may close doors for certain secondary courses and/or in professional life.

Providing an education certification for all students is self-evident for most directors and co-ordinators but requires openness and further debate among all stakeholders regarding its purpose, values, content and consequences.

### **COVID-19 IMPACT**

At this moment, implementation of Law 54 cannot be monitored without taking into account the impact of the pandemic which started in 2020 and still resonates in 2022. For all stakeholders, it is clear that COVID-19 had a considerable impact on school life and school results.

First of all, negative impact has been seen with regard to social relationships. The pandemic disrupted interpersonal relationships, informal learning opportunities, and the work of social services which is crucial in many schools to reach all families and learners. This is particularly true for younger children and for the most vulnerable learners, including those with SEN or those living in socio-economically vulnerable circumstances. Also, physical education was a challenge, to keep learners active.

Second, learning in general was disrupted. School clusters offering artistic or professional programmes had problems to offer alternatives online, but also in primary schools, in particular for those children who were just starting to read, or for learners with Portuguese as a second language, learning processes have been slowed down. Teachers are aware that some students were not learning at all and that a huge learning gap was created.



Some school clusters have seen a higher family involvement and better community relationships. They noticed that making the work of teachers more visible was received positively. Others mention that they have lost contact with families. It would have been a major help if there had been teachers from the minority communities, but there weren't (and still aren't). Digital training for parents didn't reach everyone.

Directors and co-ordinators illustrate how they managed to respond to the crisis. Schools needed to reinvent themselves. They offered digital equipment, but not all learners had internet connection. Some schools offered educational packages and also food at the school gate.

*Everything was magnified and we lost track with some children. Reaching all families wasn't possible, because health services couldn't do home visits ....*

Still, the crisis hasn't finished yet, and absenteeism is seen as a more permanent problem in many school clusters, mainly due to mental health issues. Behavioural problems, conflicts, a loss of routines and a lack of concentration in class are mentioned as main problems in the current situation. For a long period of time, children had fewer opportunities to develop empathy and social skills. Also, a lack of staff is related to the on-going crisis. There are action plans for school recovery, but the resources and the dynamics are missing.

On the other hand, digital skills and individualised feedback for learners have improved. Directors and co-ordinators generally compliment teachers for their flexibility and commitment during the crisis.

Parents agree and appreciate the efforts made by the schools. From their perspective, they highlight that for learners with significant needs it was very difficult to miss school and not to have the support from the teachers as they had in school. Coming back to school was very important for them, which proved the relationships built previously.

*What I have seen yesterday, playing with the others, it's your work!*

Finally, the learners were very open about the disruption caused by the pandemic and its on-going effects. They missed school, they missed group work, they realised that school is important for learning. Some say that they learned nothing during the lockdown, but they understand that teachers couldn't focus on all learners. Coming back, they feel tired and under a lot of pressure. For others who are more shy, distant learning seemed to work well.

*We realise how the pandemic spoiled things, and we learned from this: we come to school to learn! Before, we didn't think of this, but the pandemic made us value this.*

Learners also show empathy for learners with SEN who missed school even more, who were a bit lost. Wearing masks is seen as a difficulty for communication among all learners.

In general, learners agree that teachers have worked hard to support them. But there are different opinions regarding the quality of distant learning and support.



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*We need the patience and security of the teacher. It was good that the teachers repeated, went back, it will be good for all. We help each other, and grades will go up.*





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## IV – CONCLUDING COMMENTS

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The objective, methodology, analysis of activities conducted as well as results have been extensively explained in the previous chapters of the report. The purpose now is not to summarise them again, but to highlight a number of reflections resulting from the entire activity. Reflections concern the impact of Law 54 and the validity of the monitoring system.

### *Impact of Decree-Law 54/2018*

The Portuguese Ministry of Education deserves a positive recognition for putting in place such an ambitious and visionary law. It is aligned with the principles of inclusive education developed by international organisations (namely UNESCO since 2009) and recommended by the European Council to the Member States (since 2015). At a national level, it is a result of the long process followed by Portugal (in the past 20 years) looking for a more inclusive system of education.

Results of the activity conducted show that decision-makers, as well as practitioners involved in the activity, were well-informed about the Law, were aware of its purpose, are fully involved in its implementation, and are aware of the benefits as well as the challenges to be faced at practical level.

### *Validity of the monitoring system*

The monitoring system allows the measurement of how far the decree has been implemented, which areas look like the strong ones and which areas deserve more attention. The identification of the six standards and the eleven indicators were validated throughout the activity, using working tools addressed to decision-makers and practitioners.

Two reflections need to be raised. The monitoring system has been designed to identify *how far* Law 54 is being implemented. This means it is process oriented, looking at which are the mechanisms and provisions in place and how they are being used. It is not looking at results; it is not output oriented.

The monitoring system can be used to compare, after a period of time, the implementation of the law with current results; if progress has been consolidated or is almost achieved, as well as if there are still areas deserving special attention.

The second reflection concerns the practitioners involved in the activity. 16 school clusters have been involved in the survey; from those, nine have hosted school visits. The pandemic has impeded organising school visits to all of them. They all have provided very rich information and reflections concerning how they are implementing Law 54. It should not, however, be considered that their situation and proposals represent the situation in all school clusters in Portugal. The monitoring system can be used to know how the Law is being implemented in other clusters.

School clusters involved have played a key role as ‘pilot’ schools for the activity. They can play a role as ‘facilitators’ with other schools. Based upon the results of the entire activity, all school clusters provided feedback and reflections regarding *how to move forward*



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(presented in Annex 2). Their reflections concerning standards and indicators have shown the usefulness and potential of the monitoring system. School clusters provided important information from a practitioners' perspective that will be important to be pursued, further developed and shared with other schools.

Finally, the activity was done during a pandemic, a non-expected and unusual situation. Schools were facing lockdowns so schoolwork required 'creativity', new skills for teachers to support learners and families; social contacts among learners were reduced. Back to school took time and staff were aware of the need to pay extra attention to some negative effects of the pandemic on learners and their families. Nevertheless, in such a difficult context, there is evidence that the implementation of the Law was in place.



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## ANNEXES

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### Annex 1 – Questions and statements from the survey addressed to the 16 school clusters

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**Standard 1: Inclusive values, principles and policies are shared and accepted by all.**

*Indicator 1: Inclusive education and quality education are understood by all stakeholders as inter-related.*

Q1. How do you define inclusive education?

This question aims to understand what inclusive education means to you.

<b><i>For each statement, please indicate the response that most accurately reflects your opinion. Please select only one response per statement</i></b>	<b>Highly relevant</b>	<b>Somewhat relevant</b>	<b>Not relevant</b>
Inclusive education is a commitment to overcome discrimination and stereotypes and to ensure the rights of all learners.			
Inclusive education is a process that contributes to equity and democracy and to a greater level of social cohesion.			
Inclusive education is a way to ensure the engagement of all learners in meaningful learning opportunities.			
Inclusive education is a process of change and innovation of school culture and school organisation.			
Inclusive education is a commitment to high expectations and standards for all learners, with a focus on vulnerable learners.			
Inclusive education is a teaching and learning process that supports all learners to acquire a level of education and training which will enable them to be fully socially integrated, regardless of their personal and social situation.			
Inclusive education goes together with quality education, leading to a more effective education.			



**Q2. How do you define a quality education?**

This question aims to understand what you believe contributes to and results from quality education.

<b><i>For each statement, please indicate the response that most accurately reflects your opinion. Please select only one response per statement.</i></b>	<b>Highly relevant</b>	<b>Somewhat relevant</b>	<b>Not relevant</b>
Quality education ensures equal access, equal opportunities, and success for all learners.			
Quality education provides a positive school climate and positive teacher–learner relationships.			
Quality education ensures the highest performance of learners.			
Quality education is related to inclusive education.			
Quality education involves equal access to classroom activities.			
Quality education sets high expectations and standards for all learners, allowing them to reach their potential.			
Additional comments (40 words maximum):			

*Indicator 2: Mechanisms are in place to ensure that all stakeholders are informed about the values and principles of inclusive education.*

**Q3. What types of information on inclusive education have you received, when and from whom?**

This question aims to clarify the information you have received concerning inclusive education values and principles. It also seeks to understand the context in which you have received this information.

<b><i>For each statement, please indicate the response that most accurately reflects your experience. Please select only one response per statement.</i></b>	<b>Highly accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
The Ministry of Education has provided clear policy information through policy briefs, emails, manuals, etc.			
The Ministry’s website fully explains the rationale for new legislation such as Law 54.			



<p><b><i>For each statement, please indicate the response that most accurately reflects your experience. Please select only one response per statement.</i></b></p>	<p><b>Highly accurate</b></p>	<p><b>Somewhat accurate</b></p>	<p><b>Not accurate</b></p>
<p>The inspectorate offers school clusters the opportunity to discuss the values and principles of inclusive education.</p>			
<p>School clusters have taken the initiative to organise informative meetings and dialogue among school leaders.</p>			
<p>All schools have received a manual to implement inclusive education, highlighting its values and principles.</p>			
<p>Media sources covered the topic of inclusive education (social media, TV/radio, journals, news, etc.) at the time of the new legislation.</p>			
<p>Other professionals, e.g. resource centres for inclusion, have collaborated to share information.</p>			
<p>Information was provided before the adoption of Law 54.</p>			
<p>Information was provided at the time of the adoption of Law 54.</p>			
<p>Information has been regularly provided since the adoption of Law 54.</p>			
<p>Additional comments (40 words maximum):</p>			

**Standard 2: The required resources are available and accessible to support inclusive education.**

*Indicator 3: Required resources are provided and applied to support inclusive education, in accordance with schools' needs.*

**Q4. What criteria are used to allocate resources to support inclusive education?**

This question aims to clarify how, and based on what information, existing resources can be allocated to support inclusive education.



<b><i>For each statement, please indicate the response that most accurately reflects your experience. Please select only one response per statement.</i></b>	<b>Highly accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
There are clear policy guidelines at the national level for determining the allocation of additional resources and staff.			
Resource allocation is based upon precise needs provided by schools.			
External assessment is needed to allocate additional resources such as assistive devices.			
Schools must make a request to mobilise additional resources.			
Resources are continuously monitored and reviewed.			
Additional comments (40 words maximum):			

**Q5. Who is responsible for resource allocation decisions?**

This question aims to understand which service, organisation or individual you contact when you seek a decision about the allocation of additional resources.

<b><i>For each statement, please indicate the response that most accurately reflects your experience. Please select only one response per statement.</i></b>	<b>Highly accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
Specific departments within the Ministry of Education depending on the type of resource required			
The municipality			
The regional educational authorities			
The school's head teacher/principal			
Resource centres for inclusion			
Additional comments (40 words maximum):			



**Q6. What types of resources are requested most often?**

This question aims to understand the types of resources that are requested most to support inclusive education.

<b><i>For each statement, please indicate the response that most accurately reflects your experience. Please select only one response per statement.</i></b>	<b>Most often</b>	<b>Somewhat often</b>	<b>Not often</b>
Additional support teachers			
Specialist teachers			
Sign language teachers			
Therapists			
Professionals from Resource Centres for Inclusion			
Assistive products and devices			
Improvements to accessibility of buildings and classes			
Technological devices (computers, tablets, etc.)			

*Indicator 4: Provision, availability, accessibility and efficiency of resources are continuously reviewed.*

**Q7. How difficult is it to obtain resources?**

This question aims to understand if there are difficulties in obtaining certain resources and why.

<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
Resources can be obtained easily.			
The process of obtaining resources is too long.			
There are budget shortages that affect the process of obtaining resources.			



<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
There is not enough information on available resources.			
There are not enough support professionals available.			
The need for resources is linked to a lack of professional training at the school level.			
Additional comments (40 words maximum):			

**Standard 3: Schools are organised and managed autonomously to support all learners in the most appropriate way.**

*Indicator 5: Clear mechanisms to support schools and learners are in place, ensured and monitored.*

**Q8. To what extent do schools provide support to learners according to their individual needs?**

This question aims to understand how support is provided to schools and learners, taking into account individual learners' needs. It also aims to clarify if this support is monitored and by whom.

<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
Schools are able to make autonomous decisions about curricular accommodations for learners.			
Schools are able to identify barriers to learning, in order to consider the appropriate strategies to overcome them.			
Schools operate within the multi-level system of support when considering appropriate support for learning.			





<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
Schools are able to decide on non-significant adaptations to accommodate individual learner needs.			
Schools are able to decide on significant adaptations to accommodate individual learner needs.			
Schools autonomously monitor the process of providing support to learners.			
Schools have clear guidelines and strategies to monitor the process of providing support to learners.			
Legislation clarifies procedures for monitoring the process of providing support to accommodate learners' individual needs.			
The inspectorate supports schools in monitoring the process of providing support to accommodate learners' individual needs.			
Resource centres for inclusion support schools in monitoring the process of providing support to accommodate learners' individual needs.			
Additional comments (40 words maximum):			

**Q9. How is support provided to learners as they transition to the next educational level?**

This question aims to understand how schools can support learners during transitions between different levels of education.

<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
Legislation sets clear guidelines on preparing learners for the transition from one level of education to the next.			



<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
Manual(s) are available and provide clear guidelines on preparing learners for the transition from one level of education to the next.			
School staff from different levels of education collaborate to prepare for the transition from one level of education to the next.			
School staff collaborate with resource centres for inclusion staff to prepare for the transition between education levels.			
Multi-disciplinary teams play a key role in preparing for the transition between education levels.			
Transitions are mainly prepared for learners with the most severe learning difficulties.			
Additional comments (40 words maximum):			

*Indicator 6: Schools are involved and manage support autonomously.*

**Q10. To what extent do teachers and other professionals collaborate to provide individualised support?**

This question aims to understand how teachers, support teachers and other professionals external to schools collaborate to provide support.

<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
All school staff are involved in implementing and reviewing the required support.			
All teachers are involved in developing and using curricular accommodations.			
All teachers are involved in decision-making and developing non-significant adaptations.			



<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
All teachers are involved in decision-making and developing significant adaptations.			
Teachers and other professionals are involved in the assessment of barriers to learning.			
Specialist teachers work with mainstream classroom teachers when accommodating the curriculum to improve access to learning.			
Staff mobility can affect collaboration among all professionals.			
Additional comments (40 words maximum):			

**Q11. In what ways are school leaders involved in managing and providing educational support to learners?**

This question aims to understand the role of school leaders in the management and provision of educational support to learners.

<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
School leaders encourage all staff to have high expectations for all learners.			
School leaders ensure teachers are aware of their roles and responsibilities in the multi-level system of support.			
If decided upon, school leaders can mobilise additional resources at class councils.			
School leaders have a role in connecting teachers and other professionals and shaping the conditions for collaboration.			
School leaders promote positive school and classroom behaviour by encouraging mutual respect.			



<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
Additional comments (40 words maximum):			

**Standard 4: Learners’ and families’ voices are respected and considered.**

*Indicator 7: Policies and operational mechanisms are in place ensuring the full involvement of learners and their families.*

**Q12. How do educational planning and evaluation of accommodation, curricula, resources and/or support consider learners’ and families’ opinions?**

This question aims to understand what mechanisms are in place to ensure families and learners are involved in the entire education process.

<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
Mechanisms are in place to ensure all families are informed concerning their children’s education.			
Mechanisms are in place to ensure all families can participate in decision-making concerning their children’s education.			
Families are informed about resources and/or support required for their children.			
Families’ voices are considered and valued.			
The participation of all learners in the school community is ensured.			
All learners are involved in decision-making about their individual learning programmes.			
All learners are enabled to express their views.			
Parents/guardians are able to make informed decisions about their children’s educational future.			
Additional comments (40 words maximum):			



*Indicator 8: Clear mechanisms exist to resolve conflicts or discrepancies.*

**Q13. How are conflicts or discrepancies between school professionals and families regarding support, assessment and/or other inclusive education issues resolved?**

This question aims to clarify the existing mechanisms used in case of conflict or discrepancies between professionals and families.

<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
Clear policies are in place to resolve discrepancies or conflicts.			
Conflict resolution mechanisms for schools are in place.			
All schools are aware of and informed about existing policies and operational mechanisms.			
Conflicts or discrepancies are resolved according to criteria set up at the school level only.			
School staff are expected to resolve any conflict or discrepancy.			
Parents/families can always appeal in case of disagreement.			
Additional comments (40 words maximum):			



**Standard 5: Training and professional development are effective and accessible.**

*Indicator 9: Provision of professional development concerning inclusive education is ensured for all school personnel.*

**Q14. To what extent are newly graduated teachers prepared to teach in inclusive settings?**

This question aims to understand the extent to which inclusive education is included in initial teacher training.

<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
Newly qualified teachers are well-prepared to teach diverse groups of learners.			
Newly qualified teachers are well-prepared to collaborate with colleagues and other professionals.			
Newly qualified teachers are well-prepared to accommodate learners by adapting the curriculum.			
Newly qualified teachers are well-prepared to identify barriers to learning.			
Newly qualified teachers are well-prepared to support learners according to their individual needs.			
Teacher educators who train future teachers are equipped to prepare pre-service teachers for inclusion.			
Additional comments (40 words maximum):			



**Q15. What kinds of opportunities to learn about inclusive education are available for all school professionals?**

This question aims to understand whether learning opportunities on inclusive education are provided to all school staff.

<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
Newly qualified teachers receive mentoring on inclusive education.			
Schools offer a variety of peer-learning activities regarding inclusive education.			
There are conferences and workshops on inclusive education.			
There are professional development pathways for inclusive education, such as post-graduate programmes.			
Some programmes provide specialised qualifications focusing on inclusive support and collaboration.			
Teachers are encouraged to participate in mobility programmes on inclusive education.			
Collaboration among professionals creates opportunities for professional development.			
School collaborations with universities and teacher training colleges offer school staff opportunities for professional development for inclusion.			
Additional comments (40 words maximum):			



Q16. To what extent do teachers and other professionals take advantage of learning opportunities?

This question aims to understand whether teachers and other professionals use and benefit from learning opportunities.

<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
All school professionals are invited to professional development opportunities on inclusive education.			
All professionals involved in inclusive education have a professional development plan.			
Participation in professional development is required and monitored.			
Teachers largely participate in professional learning opportunities for inclusion.			
Other professionals largely participate in professional learning opportunities for inclusion.			
Teacher educators largely participate in professional opportunities for inclusion.			
Additional comments (40 words maximum):			





*Indicator 10: School leaders promote professional development opportunities on inclusive education.*

**Q17. To what extent do school leaders promote participation in professional development for inclusive education?**

This question aims to understand if school leaders are aware of and promote professional development to all staff.

<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
School leaders set the policy for professional learning requirements for inclusion to the Training Centres.			
School leaders act as mentors for school staff.			
School leaders have a duty to ensure professional development for staff.			
School leaders provide information to staff on effective and innovative ways of teaching.			
Additional comments (40 words maximum):			

**Standard 6: Success and certification.**

*Indicator 11: Policy and operational mechanisms are in place to ensure success for all learners.*

**Q18. What assessment information is available for evaluating learners in the framework of inclusive education?**

This question aims to determine the existence of mechanisms to ensure evaluation, assessment and progress of all learners.

<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
National policies are clearly communicated to schools to ensure the assessment and evaluation of all learners.			
Mechanisms are clearly communicated to schools to ensure the assessment and evaluation of all learners.			



<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
School staff are aware of the existing policies and mechanism in place.			
Families are involved in the assessment of their children.			
Learners are involved in the assessment process.			
Schools use on-going assessment to improve learning and participation.			
Schools keep accurate records to report on learners' achievement.			
Additional comments (40 words maximum):			

**Q19. To what extent do all learners have access to learning results and certifications?**

This question aims to identify the mechanisms that ensure all learners' acquisition of learning and training opportunities, results and certification.

<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Highly accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
Clear national policies are communicated to schools to ensure the provision of certificates to all learners according to their educational results.			
Clear mechanisms are communicated to schools to ensure the provision of education certificates to all learners.			
Schools ensure each learner can reach their full potential.			
Schools provide everything necessary for all learners to succeed and achieve in education.			
Schools face some difficulties in providing the opportunities for all learners to succeed and achieve in education, but work to resolve them.			



<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Highly accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
Learners are invited to discuss issues concerning their certification.			
Families are well-informed and have opportunities to share their opinions concerning their children's certification.			
Additional comments (40 words maximum):			

### **The impact of COVID-19**

The following two questions relate to the potential impact of the COVID-19 pandemic on the six standards covered in the previous sections.

Q20. To what extent has the pandemic affected the following areas corresponding to the six standards?

This question explores what areas might be most affected by the pandemic.

<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Very much</b>	<b>To some extent</b>	<b>Not at all</b>
The principles and values of inclusive education			
The allocation of required resources			
Collaboration among professionals			
Learners' and families' involvement in planning and evaluation of the educational process			
Training and professional development in inclusive education			
Provision of equal opportunities for all learners			



**Q21. How has the pandemic had an impact on the implementation of inclusive education?**

This question seeks to understand the ways in which the pandemic and school closures have affected the implementation of inclusive education.

<b><i>For each statement, please indicate the response that most accurately reflects the situation, in your opinion. Please select only one response per statement.</i></b>	<b>Most accurate</b>	<b>Somewhat accurate</b>	<b>Not accurate</b>
During the pandemic and school closures, meaningful learning opportunities have been offered to all learners.			
During the pandemic and school closures, school staff and support staff have taken responsibility for all learners.			
During the pandemic and school closures, support services have reached out to learners who need additional support.			
During the pandemic and school closures, the use of additional resources has intensified.			
Multi-disciplinary teams have collaborated to provide assessment services during the pandemic.			
Collaboration among teachers has intensified during the pandemic and school closures.			
Schools have offered opportunities to support parental/familial involvement during the pandemic.			
During the pandemic and school closures, school teams have maintained learners' involvement in their educational planning.			
During the pandemic, new virtual opportunities for teacher professional learning have emerged, e.g. webinars and online meetings.			
Inequality of access to curriculum has increased during the pandemic and school closures.			
There has been an increased need for learner support due to the pandemic and school closures.			
Additional comments (40 words maximum):			



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## Annex 2 – Reflections from school clusters involved: moving forward

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### Introduction

The visits to nine school clusters have enriched and completed the information already received from 16 school clusters through the survey, concerning the implementation of the Law 54 (according to the six identified standards).

The visits have allowed the exchange, sharing and discussion of information with all stakeholders involved.

This working document is not a summary analysis of the school visits. This is an open working document for discussion and reflection upon the six standards. The purpose is to: a) present and share how the school clusters are implementing the six standards in their daily practice, some common and different educational strategies, and some concerns expressed; b) reflect and agree upon a non-exhaustive number of issues considered relevant for further steps: how to move forward.

### **Standard 1: Inclusive values, principles and policies are shared and accepted by all.**

Law 54: According to Chapter I, Article 3 and Chapter II, Articles 6–10, legislation highlights principles and values regarding inclusive education.

Summing up: Inclusive education values and principles are shared by all stakeholders met during the school visits: managers, teaching and non-teaching staff, parents and learners. The way inclusive education is defined and/or perceived might be slightly different, but there are some terms permanently raised: quality (of education), respect and acceptance (of differences), trust (on capacities), well-being (of learners), belonging (to the school and class), success (for all).

#### *Examples of how inclusive education is defined by school clusters*

- All learners, regardless of their family situation, have the right to/deserve the best quality education.
- Education for all, with all, without barriers, without labelling.
- It is for learners to enjoy learning.
- It implies a mentality change, to listen, understand and place yourself in others' place.
- It is to be open to change and innovation.
- No learner is left behind, every learner capability (academic or social) is maximised.
- It is a process to be followed by teachers and by learners too.

#### *Issues expressed by school clusters*

- Not the entire school team is committed and shares values, mainly because there are new professionals, or because they are not interested.



- Inclusive education requires paying attention to all learners, from the most vulnerable to the talented ones.
- The core team is essential to share values and principles. Changes of the core team could change the inclusive school culture.

#### *Issues for further reflection*

- **Full school involvement:** How to involve them?
- **Inclusion means all learners:** How to avoid forgetting any learner?
- **Keeping the inclusive school culture:** How to avoid moving backwards?

#### **Standard 2: The required resources are available and accessible to support inclusive education.**

Law 54: According to Chapter III (Article 11) specific human, organisational and community resources are mobilised, available and accessible to support inclusive education so that everyone learns and participates in learning and is part of the community.

Summing up: Schools are using as many resources available as possible. Quality IT equipment (material resources) is available. Although resources are closely related to support measures, it is relevant to have a careful look at the provision, use and evaluation of resources.

#### *List of key resources mentioned by the majority of school clusters*

- Material resources such as: IT devices; Materials for diverse activities in the school.
- Human resources (HR) such as: Specialised teachers; Subject teachers; Psychologists; Professionals from health and/or social services; Operational assistants; Social mediators.

#### *Resources are provided by*

- For material resources: Directorate General for Education (DGE); Local community; Private companies; Parents.
- For HR: DGE; National projects; European projects; Local authorities.

#### *Main difference among school clusters*

- HR: extra HR are not always requested; a few school clusters don't express any need for extra human resources.
- Support and collaboration with the local community: very relevant for some clusters, very limited for others.

#### *Issues for further reflection*

- **HR evaluation:** Are the required HR evaluated taking into account the purpose and ways of school support to be offered or just according to the individual needs raised?



- **Local community involvement:** How to involve the local community more (and in the best possible way)?

**Standard 3: Schools are organised and managed autonomously to support all learners in the most appropriate way.**

Law 54: According to Chapter II (Articles 6, 7,8, 9, 10) and Chapter III (Articles 11, 12, 13, 14, 15) the required support measures to schools and learners are in place; schools organise and manage these measures autonomously, to support learners in the most appropriate way.

Summing up: All schools are aware and implement measures to support learning and inclusion according to three levels of intervention: universal measures (preventive character); selective measures (intervention character); additional measures (compensatory character). Schools try to use, in the best possible way, the existing specific organisational and community resources to support learning and inclusion (multi-disciplinary team; learning support centre; reference schools; CRIs).

*Main effective measures and educational strategies mentioned by school clusters*

- Measures to support learning:
  - Universal measures (UM) are key to prevent difficulties now; the class teacher plays an essential role.
  - The law has consolidated previous UM.
  - Educational support is provided by all professionals as part of the schoolwork.
  - The entire school is a learning place.
  - The presence of multi-disciplinary teams ensures the implementation and follow up of the required support.
- Educational strategies: Co-teaching, Peer learning, Tutoring, Mentoring, Breaking down classes.
- Some other support strategies: Clubs, Academies, Offices.

*Main issues raised*

- Extra time devoted to preparing official documents when support measures are requested and need to be implemented and followed up.
- Support is mainly addressed to the class teacher and takes into account the learning dynamic of the entire class. Some learners still need time for individual support.
- Time is required to put in place curricular adaptation. Changing classroom practices requires serious efforts to re-organise teachers' (and professionals') timetable.

*Issues for further reflection*

- **Support measures procedures:** How to simplify the required 'paperwork'?



- **Individual vs. class and teacher support:** How to avoid prioritising individual support to learners outside the classroom? How to avoid that the need for individual support to learners is turning into the main type of support?
- **School autonomy:** To what extent can the school autonomy be used for these purposes? How to avoid that these difficulties impede the implementation of an inclusive way of teaching?

#### **Standard 4: Learners' and families' voices are respected and considered.**

Law 54: According to Chapter I (Articles 3, 4), Chapter II (Article 7) families and learners are to be fully involved in the entire educational process.

Summing up: Parents and learners have expressed an overall satisfaction with the schools. Parents involved in the visits – the majority with children with educational needs – expressed their satisfaction with the schoolwork. The great majority of learners involved – from first cycle of primary to vocational education; with and without special needs – found their schools much better, open and respectful compared to schools they were previously attending. All schools welcome learners from different nationalities; an important number of schools also welcome learners from very disadvantaged families, from minority groups such as Roma and refugees.

#### *Main information provided by families and learners*

- Families:
  - Parents' association is a formal way to be represented in the school.
  - Family representatives are members of the school council.
  - Parents feel welcomed and listened to.
  - Parents are invited to come to the school and talk about their work, teach some skills.
  - Relationship, communication with parents.
  - All learners are respected.
  - Parents play an active role facilitating contacts with the community.
- Learners:
  - It is a school with all kinds of learners and a very diversified way of teaching.
  - In case of conflict, the school deals with it in a positive way.
  - We manage to be together, to have activities together with mutual support; that makes us want to come to the school, not just to learn and study.
  - The school is very important in motivating everyone to come to the school.
  - At school we have more ways to learn, to do different things; there are always people to help us, not only the teachers.
  - In cases of violence or bullying, it is not just the teachers who act, but also the learners.





### *Main issues raised by*

- School professionals:
  - Parents are involved in curriculum development, but not in decision-making.
  - Families with a low socio-economic situation, from minority groups and, parents of learners in higher levels of education are less involved.
  - There is a legal framework for parents' participation through the class councils, but it is not always followed).
  - There are barriers among parents (mainly against the Roma community).
  - Sometimes parents are pushing for additional measures.
  - There is still a long way to listen to the learners' voice.
  - Fighting against learners' absenteeism and drop out is a priority
- Families:
  - It may be the support from the municipality to families that fails, not the school.
  - The school is responsible for what is done in the school, so it is not a real partnership.
  - Documents are not always presented to parents.
- Learners:
  - Students' representatives would like to provide ideas and proposals, but they don't feel it has been taken into account.
  - There are a lot of tests, a lot of pressure that needs to be reduced.
  - Sometimes in some classes there are problems with racism.
  - Some learners don't like when a teacher is all the time with/next to the learner.
  - More effort and attention needs to be paid to learners with high potential.

### *Issues for further reflection*

- **Parents' participation:** How to ensure and increase families' participation in school life?
  - Participation and involvement of all families are relevant, even more in case of disadvantaged families and from the Roma community. Schools have in place several options such as co-operation with social worker and mediators.
- **Parent's role:** How can the school ensure the formal role expected of parents?
- **Learners' voices:** There are differences among schools regarding how to involve learners in school life. How to move forward?
- **Learners' schoolwork:** How can the situation be balanced/improved?



- Many learners (mainly from secondary education) felt under stress with schoolwork and timetables they need to follow; the opposite happens with learners with high potential.

### **Standard 5: Training and professional development are effective and accessible.**

Law 54: Although the law does not devote any specific article to professional development, it is implicit in the need for all professionals to upgrade and share their competences to achieve the objectives of the law.

Summing up: In-service training is considered necessary and positive in all schools. It is conducted in different ways following strategies and agreements among each school. Directors play a key role in promoting in-service training according to the needs of the entire staff.

#### *Main information provided by schools*

- Initial training provides general knowledge on education; it does not cover all areas to be faced by teachers in their daily work.
- Training is perceived as very necessary and beneficial.
- Compulsory courses can be followed by all teaching staff.
- Training centres linked to school clusters provide general and specific training sessions.
- Schools organise other types of informal training: among schools or in-house training among colleagues.
- Special teachers can act as reference teachers, providing expertise to teachers.

#### *Main issues raised*

- In-service training is perceived as key for all professionals in the school (teaching and non-teaching staff). Time is required.
- Some teachers lack motivation to be involved.

#### *Issues for further reflection*

- **In-service training for non-teaching staff:** Not all schools seem to provide training for the non-teaching staff. Why and how to extend training to all school professionals?
- **In-service training organisation:** To what extent are schools evaluating the organisation and management of in-service training to better respond to their needs?
  - There are differences among schools in the way in-service training is organised (during school time only or not) and managed (only in/for the school staff or with other schools).



## **Standard 6: Success and certification.**

Law 54: According to Chapter IV (Article 20) and Chapter V (Articles 27, 28, 29, 30), the educational system promotes and ensures equal opportunities for all learners, enabling them to acquire a level of education and training that allows them to be fully socially integrated. At the end of their school education, they all have the right to a certificate and diploma, attesting the completion of compulsory education.

Summing up: Schools are aware and committed to ensure that all learners, despite their personal, social or family situation, benefit from all educational opportunities offered by the school. The school can and needs to act as a 'social elevator' for the most disadvantaged. School success is understood according to the spirit of the law: to reach their maximum capacity; to educate full citizens and to be provided with a certificate or diploma.

### *Main information provided by schools*

- Curriculum differentiation, to ensure school success, still needs to be more developed by the schools.
- To ensure school success is an on-going process.
- The certificate needs to reflect the progress achieved by learners. It might be important to also include non-formal learning activities.
- There is too much focus on summative assessment; there is a need to move from summative to formative evaluation, where self-evaluation by learners can be implemented more.
- The MAIA project has provided teachers with useful training on formative assessment.
- Transition to HE or finding a job is still to be worked out, looking for better strategies.

### *Main differences among schools*

- The majority of schools have good school results, raising the national average or above it. But some are struggling due to the learners' social and family context. Absenteeism, drop-out and grade retention are concerns in some schools.
- Schools follow different approaches concerning assessment: a continuous evaluation during the school year; learners self-evaluation; additional assessment periods... They raise a contradiction in the law regarding the need for a summative assessment (namely the national exam, same for all).

### *Issues for further reflection*

- **What school success means**: It is important to agree what school success means. To what extent and how to highlight academic achievements and social outcomes ('not just excellence but also values')?



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- **Formative vs. summative evaluation:** How to balance and use in the most appropriate way both assessment procedures? How to ensure that learners are not mainly 'trained' to pass the national exam?
    - Schools try to prepare learners for the national exam, trying to de-mystify it with frequent self-learning and self-evaluation materials.

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