4. Promoting school-level responses to student diversity

This chapter examines ways in which Portugal's commitment to respond to student diversity by promoting equity and inclusion in education is reflected in practices and organisational arrangements at the school level. It argues that, while there is widespread commitment to these principles across the education system, practices in schools vary considerably. There are, however, examples of effective practices that can be built upon. Attempts to address these challenges point to the importance of providing powerful forms of professional learning that will support the promotion of inclusive practices. In addition, there is need for professional learning opportunities for those in leadership roles within schools. There is a lack of local area coordination of efforts to mobilise the potential that exists in order to create a more effective middle tier. There is also a need to strengthen strategies for monitoring and evaluating the implementation and impact of policies.

Context and features

Portugal is internationally recognised for its progressive legal framework in relation to equity and inclusion in education (All means all, 2018[1]). Since Decree Law No. 3/2008 was introduced over a decade ago, special schools have been transformed into Resource Centres for Inclusion (RCIs), tasked with supporting their former students, who are now placed in mainstream schools. This pathway continued significantly with the Decree Law No. 54/2018 on inclusive education, which created a further impetus for promoting inclusive education (see Chapter 2).

With this agenda as the focus, the Government has given priority to the development of education policy that guarantees equal access to public education in ways that are intended to promote educational success and equal opportunities. In so doing, the state promotes the democratisation of education and the other conditions for education, carried out through schools and other means, necessary to contribute to equal opportunities, the overcoming of economic, social and cultural inequalities, the development of personality and the spirit of tolerance, mutual understanding, solidarity and responsibility, social progress and democratic participation in collective life.

Addressing barriers

In line with current international thinking regarding educational equity and inclusion (UNESCO, 2020[2]), the Portuguese legislation emphasises the responsibility of schools to identify barriers to individual students' learning and develop strategies to overcome them. It also calls for a change in school cultures to encourage more multilevel and multidisciplinary interventions, a demonstrated commitment to inclusive practices and a move away from categorising students.

In Portugal, all educational policy documents make reference to inclusive education and non-discrimination. This reflects principles and norms that seek to guarantee inclusion as a process that aims to respond to the diversity of needs and promote the potential of every student, by increasing participation in the process of learning and within the life of educational communities.

Policies that guarantee equal access to schools, while promoting educational success, have been summarised in a set of guiding principles (Ministry of Education, 2022[3]):

- fostering the improvement of teaching and learning quality
- guaranteeing an inclusive school, which fosters equality and non-discrimination, whose diversity, flexibility, innovation and personalisation respond to student heterogeneity
- valuing the Portuguese language and culture as vehicles for fostering national identity
- valuing foreign languages as vehicles for fostering global and multicultural identity and facilitating access to information and technology
- valuing the community and students' linguistic diversity, as an expression of individual and collective identity
- promoting citizenship and personal, interpersonal, and social intervention development education throughout compulsory schooling.

Meanwhile, any student can benefit from curricular accommodations (see Table 4.1) that aim to facilitate their access to the curriculum and learning activities in the classroom. This is promoted through the diversification and appropriate combination of various teaching methods and strategies, the use of different methods and evaluation tools, the adaptation of educational materials and resources, and the removal of barriers in the organisation of space and equipment, designed to respond to the different learning styles of each student and to promote their educational success.

**Table 4.1. Curriculum management measures**

Curriculum management measures	Definition
Curriculum accommodation	Measures that support access to the curriculum and learning activities in the classroom through the diversification and appropriate combination of various teaching methods and strategies, the use of different methods and evaluation tools, the adaptation of educational materials and resources, and the removal of barriers in the organisation of space and equipment, designed to respond to the different learning needs of each student and to promote their educational success.
Non-significant curriculum adjustments	Measures that do not compromise the learning foreseen in the curriculum documents. They may include adaptations with regard to objectives and content by altering their prioritisation or sequencing, or by introducing specific intermediate objectives that allow the achievement of the overall objectives and the essential learnings to develop the competences foreseen in the *Profile Of The Students At The End Of Compulsory Schooling.*
Significant curriculum adjustments	Measures which have an impact on the learning foreseen in the curricular documents, requiring the introduction of other alternative learning objectives, establishing overall goals in terms of the knowledge to be acquired and the competences to be developed, in order to promote autonomy, personal development, and interpersonal relationships.

Source: Ministry of Education (2022[3]), *OECD Review for Inclusive Education: Country Background Report for Portugal*.

Data from the OECD's Teaching and Learning International Survey (TALIS) 2018 indicates that Portugal, according to school principals' perceptions, performed better than the OECD average in many areas related to school practices for equity and diversity in 2018 (OECD, 2019[4]). Figure 4.1 shows that in Portugal almost all of principals surveyed in TALIS 2018 (99.6%) reported that teaching to students in their school was inclusive of different socio-economic backgrounds, compared to lower OECD and European Union (EU) averages (respectively 92.3% and 92.1%). Portugal also had a higher percentage of principals that reported explicit policies against socio-economic discrimination were implemented in their schools compared to OECD and EU averages (77.3% in Portugal against 74.8% on average across OECD countries and 71.8 on average across EU countries). More Portuguese principals (94%) than principals on average across OECD countries (80.3%) and EU countries (86.6%) also reported that additional support for students from disadvantaged backgrounds was provided in their school. Only in terms of the school-level implementation of explicit policies targeting gender discrimination did Portugal score slightly lower than the OECD average, while being in line with the EU average. Specifically, 78.3% principals reported that these policies were implemented in their school, compared to an average of 80.2% across OECD countries and 78.5% across EU countries.

Figure 4.1. School practices related to equity (TALIS 2018)

Percentage of lower secondary principals reporting that the following policies and practices are implemented in their school
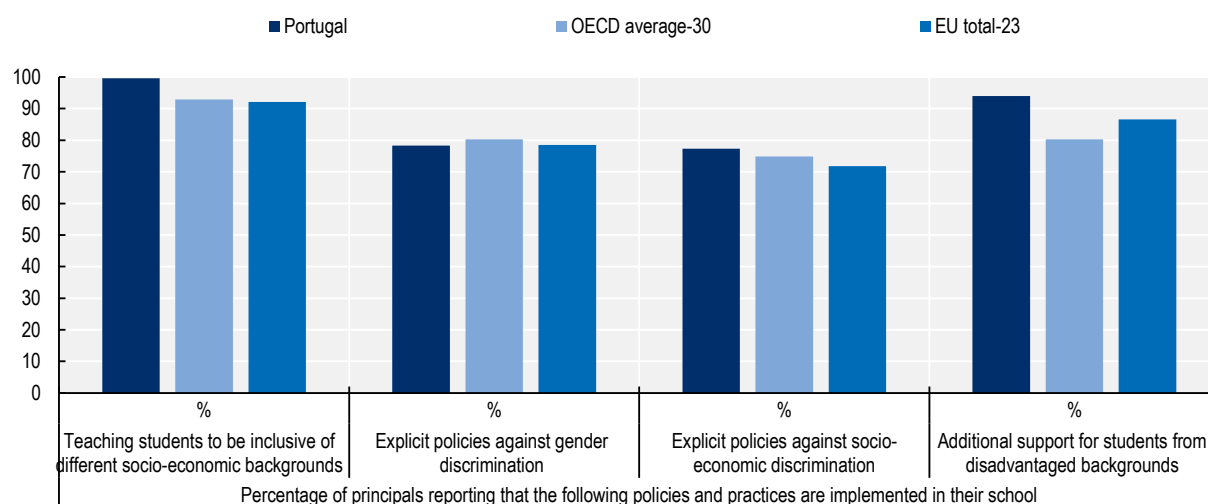
Notes: Values are ranked in descending order of the prevalence of equity-related school practices.
OECD average-30: arithmetic average based on ISCED 2 principal data across 30 OECD countries and economies with adjudicated data. The report refers to the average school or principal "across the OECD" as equivalent shorthand for the average school or principal "across the 30 OECD countries and economies participating in TALIS".
Source: OECD (2019[4]), *TALIS 2018 Results (Volume I): Teachers and School Leaders as Lifelong Learners*, Table I.3.34., https://dx.doi.org/10.1787/1d0bc92a-en .

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As shown by data from TALIS 2018 (OECD, 2019[4]), Portugal also performed better than OECD countries in some areas related to school-level practices for diversity, as reported by principals included in the survey. Figure 4.2 shows that 92.6% principals reported that their school adopted teaching and learning practices that integrate global issues throughout the curriculum, compared to an OECD average of 79.9% and an EU average of 84.4%. A similar percentage of Portuguese principals (91.7%) also reported that their school taught how to deal with ethnic and cultural discrimination, compared to 79.8% principals on average across OECD countries and 82.7% on average across EU countries. Additionally, in line with the EU average (67%), a higher percentage of principals in Portugal (66.6%) stated that their school supported activities or organisations encouraging students' expression of diverse ethnic and cultural identities compared to the OECD average (61.3%). Only in terms of the organisation of cultural events at school, fewer principals in Portugal reported to do this compared to principals on average across OECD and EU countries (51.2% in Portugal, 55.3% on average across OECD countries and 54.5% across the EU).

Figure 4.2. Percentage of teachers working in a school with diverse ethnic and cultural student background[1] where the following diversity-related practices are implemented

Results based on responses of lower secondary principals
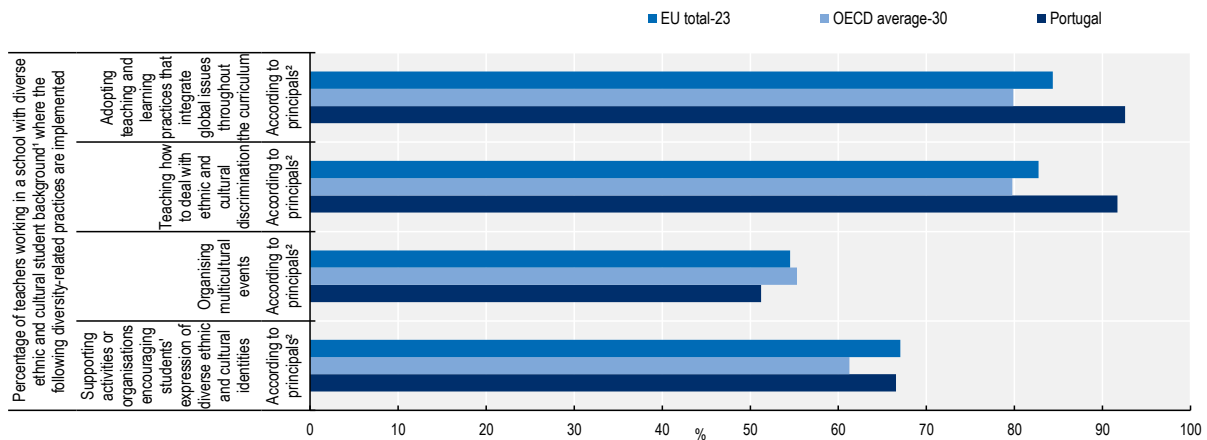
Notes: 1. The sample is restricted to teachers who teach in schools that include students from "more than one cultural or ethnic background" based on both teachers and principals' responses in TALIS 2018.

2. Principals' responses were merged to teacher data and weighted using teacher final weights.

OECD average-30: arithmetic average based on ISCED 2 principal data across 30 OECD countries and economies with adjudicated data. The report refers to the average school or principal "across the OECD" as equivalent shorthand for the average school or principal "across the 30 OECD countries and economies participating in TALIS".

EU total-23: weighted average based on ISCED 2 teacher or principal data across all EU Member States that participate in TALIS with adjudicated data.

Source: OECD (2019[4]), *TALIS 2018 Results (Volume I): Teachers and School Leaders as Lifelong Learners*, Table 1.3.35., https://dx.doi.org/10.1787/1d0bc92a-en.

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The approach to learning

A pedagogical model is recommended in the Portuguese policy, built around the notion that all students have learning potential that can be harnessed when students receive adequate support. The methodological options underlying this law are based around the universal design for learning model and a multilevel approach to access the curriculum.

As noted previously (see Chapter 2), the tiered multilevel approach encompasses the implementation of three types of measures, identified in the legislation as i) *universal measures*, targeted to all students in order "to promote participation and improved learning" (Decree Law No. 54/2018, Art. 8)[1]; ii) *selective measures*, aimed to fill the need for learning supports not addressed by universal measures; and iii) *additional measures*, set in place "to respond to intense and persistent communication, interaction, cognitive or learning difficulties that require specialised resources of support to learning and inclusion" (Decree Law No. 54/2018, Art. 10).

Importantly, the legislation moves away from a view that it is necessary to categorise to intervene. Rather, it supports the idea that all students can achieve a profile of competences and skills at the end of their compulsory education career, even if they follow different learning paths. Therefore, it views flexible curricular models, systematic monitoring of the effectiveness of the implemented interventions, and an ongoing dialogue between teachers and parents, or other caregivers, as "the educational responses necessary for each student to acquire a common base of competences, valuing their potential and interests" (Decree Law No. 54/2018, Introduction).

Towards inclusive schools

Since 2008, Portugal has had in place laws envisioning the provision of education to all students, without exception, in their local mainstream school in accordance with Article 24 of the United Nations Convention on the Rights of Persons with Disabilities (CRPD). These laws also create explicit obligations requiring the adjustment of the educational process to include all students. This has also led to the establishment of a national network of Information and Communication Technology Resource Centres for Inclusive Education (*Centros de Recursos Tecnologia da Informação e Comunicação para a Educação Inclusiva*, CRTIC) to support general education schools, which assess students' needs for assistive technology.

Consistent with the obligation under the CRPD for countries to transform their domestic education systems progressively and systemically into genuinely inclusive systems, Decree Law No. 3/2008 also initiated a process of reorientation for most of Portugal's special schools, transforming them into Resource Centres for Inclusion (*Centros de Recursos para a Inclusão*, CRIs). These Centres provide specialised support assistance to mainstream schools through partnerships with school clusters. Their roles include facilitating access to education, training, work, leisure, social participation and the promotion of autonomy.

The reform programme has led to a push to develop inclusive schools "where each and every student, regardless of their personal and social situation, finds responses to their potential, expectations, and needs, and develops a level of education that creates full participation, a sense of belonging, and equity, contributing to social inclusion and cohesion" (Decree Law No. 54/2018). However, Alves, Campos Pinto and Pinto (2020[5]) argue that the challenges of implementation, especially a perceived lack of resources and the concern that sharing scarce resources amongst a larger group of students might disadvantage those who are the most vulnerable (e.g. students with complex learning disabilities), have created a challenge for current Portuguese education policy and practice.

Support arrangements

Portuguese schools are expected to create an organisational culture where everyone finds opportunities to learn and the conditions for the full realisation of this right. This is intended to promote the implementation of measures aimed at responding to the needs of each student, valuing diversity, and promoting equity and non-discrimination in accessing the curriculum and navigating throughout the education system.

According to the policy, teachers are expected to use teaching approaches adapted to students, mobilising the necessary measures to support their participation and learning. Commenting on this, the OECD report "Adapting Curriculum to Bridge Equity Gaps" (2021[6]) notes that teachers in Portugal make the necessary adaptations to the curriculum for students with specific needs within the framework set by the law on inclusive education. Moreover, inclusion has gained a wider reach through a process that aims to respond to the diversity of the needs and potential of each student, by increasing their participation in the processes of learning and educational community life.

Support to students with an immigrant background

In line with the guiding principles of the educational policy, specific measures have been implemented to ensure access and to improve the educational success of newly arrived immigrants and, more recently, of refugees, in primary and secondary education.

In order to improve the educational success of students with an immigrant background recently arrived in the Portuguese educational system, the Ministry of Education (MoE) is implementing educational policies of support regarding the acquisition of the Portuguese language. The latter is both a school subject and the language of schooling (see Chapter 2). These students are offered the school subject Portuguese as a second language in primary and secondary education. The objective is to guarantee to all students that

are non-native Portuguese speakers equal conditions to access the school curriculum and achieve educational success, regardless of their mother language, culture, socio-economic background, origin and age. These arrangements are offered in primary and lower secondary education in most education and training courses, including scientific-humanistic courses and specialised artistic courses in upper secondary education, as well as in professional courses with dual certification at the secondary level.

With respect to the acquisition of test-language skills for students after school hours, OECD's Programme for International Student Assessment (PISA) 2018 suggests that Portuguese schools provided more support than the average OECD country (Figure 4.3). In particular, in Portugal, the percentage of students included in PISA 2018 attending schools where additional test-language lessons were offered to all students was 84% compared to an OECD average of 46% students. However, there were variations between Portuguese schools when taking into account advantaged and disadvantaged school settings. In Portugal, 91% of students in advantaged schools reported attending schools where there was a provision of after-school test-language lessons, compared to an average of 48% across OECD countries. When considering students in disadvantaged schools, the percentage of students narrowed to 84%, still significantly above 47%, which was the average across OECD countries (OECD, 2020[7]).

Figure 4.3. Participation in additional language-of-instruction lessons after regular school hours, by schools' socio-economic profile

Based on students' reports
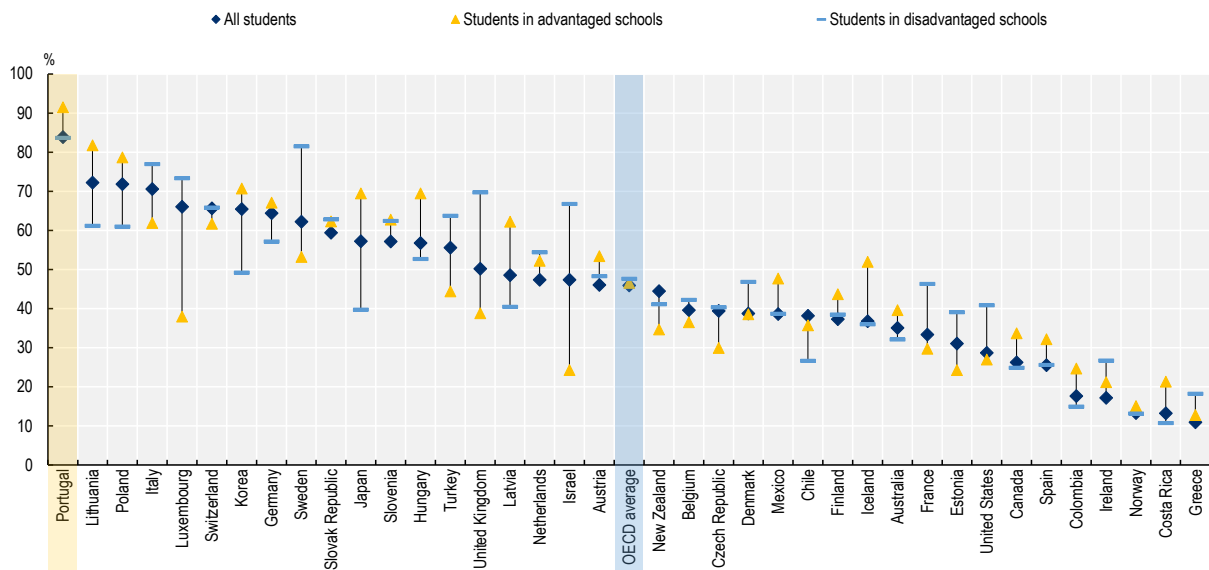
Notes: A socio-economically disadvantaged (advantaged) school is a school whose socio-economic profile (i.e. the average socio-economic status of the students in the school) is in the bottom (top) quarter of the PISA index of economic, social and cultural status amongst all schools in the relevant country/economy.
Countries and economies are ranked in ascending order of the percentage of students in schools that provide additional language-of-instruction lessons after regular school hours.
Source: Adapted from OECD (2020[7]), *PISA 2018 Results (Volume V): Effective Policies, Successful Schools*, Figure V.6.6, https://doi.org/10.1787/ca768d40-en.

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Within the scope of the Decree Law No. 54/2018, other specific educational measures can be applied by each school to support students with an immigrant background, in order to ensure their successful school

inclusion in the national curriculum. In force since 2015/2016, the Learners with refugee status and asylum seekers programme aims to welcome and include students with an immigrant background into Portuguese schools by supporting progressive access to the national curriculum and fostering their educational success. The programme reinforces support for Portuguese language learning as a subject of study and language of schooling and provides specific educational measures. These include facilitating the process of academic degree recognition, progressive integration in the curriculum, reinforcement of Portuguese language learning and School Social Assistance (*Ação Social Escolar*, ASE).

Resource Centres for Inclusion (CRIs) and Resource Centres for ICT (CRTIC)

While students seen as having additional learning needs are expected to attend mainstream schools and learn in the same classroom as other students, specific curriculum adjustments are available to ensure their access to the curriculum. To ensure adequate support for these students, specialised support staff might be available, often provided by the CRIs supporting the school. One of the fundamental pillars of the strategy for the inclusion of students with additional needs in public schools is the specialised professional support of the CRIs. In 2021, there were 102 CRIs accredited by the MoE distributed across the country.[2] After an accreditation process by the MoE for this purpose, the CRIs have established a yearly contract of specialised services, with the following key intervention areas:

- specialised support units for the education of students with multiple disabilities and congenital deaf blindness
- support for the specialised evaluation of children and young people with special education needs
- support for the implementation of curricular enrichment activities (specific programmes, adapted sport practice, etc.)
- support in the development, implementation and monitoring of Individual Education Programmes.

Students who are deaf and attend reference schools for bilingual education (mainstream schools with additional provisions) use Portuguese Sign Language (PSL) as their first language and written Portuguese language as their second language. This constitutes a specific curriculum adjustment for Portuguese as Second Language. Students are also entitled to teachers with specialised training in deafness, PSL teachers, PSL interpreters and speech therapists. Those reference schools have specific equipment and materials that guarantee access to information and the curriculum, namely, equipment and materials for visual support learning.

Some students can also be entitled to *specific curricular areas*, including vision training, using the Braille system, guidance and mobility, specific information and communication technologies and activities of daily life. Assistive technical support tools are made available to enable participation in the teaching and learning process. The Information and Communication Technical Resource Centres assess and prescribe the technical support required.

The MoE's Resource Centre produces schoolbooks in Braille, large font and Digital Accessible Information System (DAISY) formats. The Resource Centre for Information and Communication Technology for Special Education (CRTICs in Portuguese)[3] also produce adapted material and train teachers to use specialised software for different special education needs. The MoE, together with health and social security services, also provides support in early childhood intervention for the referral of students with special education needs and to support pre-school education and school development.

Schools' multidisciplinary team to support inclusion

Decree Law No. 54/2018 requires that each school cluster and individual school has a multidisciplinary team to support inclusion (*Equipa Multidisciplinar de Apoio à Educação Inclusiva,* EMAEI). The EMAEI includes permanent and variable members. The permanent members of the EMAEI are an assistant of the school director, one special education teacher, three members of the pedagogical council and the

school psychologist. The variable members of the EMAEI are chosen in relation to the student that is being taken care of, including parents. In addition, there may be the involvement of the multidisciplinary team coordinator, the coordinator of the school and/or a mainstream teacher of the student. Parents and students are also part of these teams that are responsible for:

- raising awareness of inclusive education in their educational community
- proposing learning support measures to be mobilised
- following up and monitoring the implementation of learning support measures
- advising teachers about the implementation of inclusive pedagogical practices
- preparing technical-pedagogical reports, individual educational programmes and transition plans
- following up on the functioning of the learning support centres.

These teams are in charge of identifying, supporting and following up on students who face difficulties and need extra support. They are also responsible for developing a student's Individual Educational Plan (*Programa Educativo Individual,* PEI) and Individual Transition Plan (*Plano Individual de Transição*, PIT).

For the students who need significant curricular adaptations, an Individual Educational Programme (PEI) can be designed. A PEI includes the identification of and an implementation strategy for the significant curricular adaptations and integrates the competences and learning to be developed by the student, as well as the identification of the teaching strategies and the adjustments to be made in his/her evaluation process. A PEI also includes other measures to support inclusion, to be defined by the multidisciplinary team. A PEI must include the total amount of school time, according to the respective level of education; the assistive products/devices, when appropriate and necessary for access and participation in the curriculum; and the strategies for transition between cycles and levels of education, when applicable. It is the responsibility of the EMAEI to prepare the PEI as well as the technical-pedagogical report and the individual transition plan and to follow-up, to monitor and to assess the implementation of the learning support measures.

Three years before students with the additional measure of significant curricular adaptation reach the age limit for exiting compulsory education, the school should complement their PEI with a PIT. The EMAEI must prepare the PIT in collaboration with all stakeholders in the student's educational process, and with families. The PIT must be prepared based on the evidence collected, within the scope of the support, throughout the student's educational process. The elaboration of a PIT must be based on the student's interests, on the development of realistic perceptions and on the mapping of local resources, for which there is a need for the support of the CRI working with the school. The first phase of the PIT is to discover the learner's wishes, interests, aspirations and competencies. This phase includes an assessment of the labour market needs in the learner's community and a search for training opportunities or real work experience based on the learner's interests and her/his capacity to take part in a professional activity. Once training or internship opportunities available in the community are clarified, the PIT identifies the competencies (academic, personal and social), adjustments and special equipment required. After this assessment, agreements are established with the services and institutions where the learner will be trained or intern. These define the tasks the student will do, the competencies required and the support needed to achieve these tasks.

Impacts

An OECD review, "Curriculum Flexibility and Autonomy in Portugal" (OECD, 2018[8]), concludes that Portugal has taken a sound strategic approach in relation to the education reforms. It notes that the process began by envisioning the outcomes the education system should seek for its students, based on evidence about 21st century conditions. These outcomes are expressed in a coherent strategic plan, described in detail in the reference document Students' Profile by the End of Compulsory Schooling.

The review also reports that the country has achieved widespread agreement on its reform plans through careful consultation, debate and communications that have been well handled and successful. By seeking expert advice, shareholder input, and open communication and debate, the country has also invested in the continuance of the reform plan by future governments.

A review of school resources in Portugal (Liebowitz et al., 2018[9]) argues that the school system has witnessed historic improvements in access, attainment and performance over the past 20 years. It notes that Portugal is fast approaching near universal enrolment for school-aged children since the extension of compulsory schooling to 18 in 2009. Enrolment rates of students between 3 and 5-years-old in pre-primary education increased to 88% in 2014, with a goal of universal access set for 2019.

Between 2005 and 2015, the proportion of youth under 25 years old who graduated from secondary schooling jumped from half to four-fifths of young people, by far the largest increase among OECD countries. Furthermore, in Portugal, 15-year-old students saw the greatest improvements in their science abilities of any other OECD country, as measured by the OECD PISA between 2006 and 2015. Simultaneously, the proportion of 15-year-old students scoring below baseline proficiency declined precipitously. These improvements in students' scientific skills were accompanied by similar substantial improvements in 15-year-olds' reading and mathematics skills. Likewise, Portuguese students in their fourth year of primary school have improved their mathematics skills significantly over the past 20 years, as evidenced by the Trends in International Mathematics and Science Study (TIMMS) (Liebowitz et al., 2018[9]).

Despite these impressive accomplishments, Portugal still faces significant challenges to achieve an excellent and equitable system of schools. In particular, important differences in student outcomes persist for students from under-served backgrounds, such as those from low-income families, those with low levels of parental education and immigrant students, as discussed in Chapter 1.

Strengths

In planning the next stage of development with regard to equity and inclusion in its schools, Portugal has many strengths that can be built upon. The following are particularly relevant to the promotion of equity and inclusion at the level of schools.

The widespread awareness and acceptance of national educational policies focused on the promotion of equity and inclusion provide a sound basis for developments in schools

Clarity of purpose

The review team met with a range of stakeholders across the different levels of the education system to consider progress in relation to the wide-ranging reforms that have been introduced in response to equity and inclusion principles. These stakeholders included policy makers, practitioners, young people, researchers and a variety of community representatives. A striking feature of these discussions was the widespread awareness and acceptance of the principles upon which the national education policies are based. Particularly impressive was the way that children and young people talked about their pride at being students in a school that is inclusive. Some also talked of the value they gained from being involved with such a diverse range of classmates. At the same time, there is a high level of awareness of the dangers associated with using labels in referring to potentially vulnerable groups of students. Frequent mention was also made to the political history of the country that has influenced the concern for seeing education as a basis for fostering democracy.

All of this can be contrasted with the situation in many other countries, where equity and inclusion are still matters of considerable confusion and debate. This can be seen, for example, in a series of articles in a recent special edition of the United Nation Educational, Scientific and Cultural Organisation (UNESCO) journal Prospects on the theme "Inclusive education: New developments, new challenges" (*Volume* 49, 3/4, November 2020)[4] that probe deeply into the developments and challenges that the authors have found as they analysed particular contexts around the world. For example, Khochen-Bagshaw (2020[10]) writes about progress across the Middle East and North Africa; Sharma examines developments in the Pacific region; and Calderón-Almendros and colleagues (2020[11]) analyse challenges and opportunities in Latin America. Each of these papers shed light on patterns that are evident across countries that share cultural, religious and linguistic similarities. At the same time, they also warn that this should not distract us from looking more closely at what happens within countries, since, as far as educational development is concerned, 'context matters' (Fullan, 2007[12]).

Other articles in the special edition of Prospects examine how political history has influenced progress in relation to equity and inclusion, a factor that significantly contributes to understanding developments in Portugal. This is particularly evident in Engelbrecht's analysis of developments in South Africa, which, she explains, have to be understood in relation to broader political, social and cultural developments since the end of Apartheid (Engelbrecht, 2020[13]). In their account of developments in Australia, Boyle and Anderson (2020[14]) argue that current reform agendas situate inclusive education against, rather than alongside, other prevailing policies. And in their analysis of current developments in the Canadian province of Nova Scotia, Whitley and Hollweck (2020[15]) explain how, as in Portugal, the inclusion agenda has broadened to focus on all students, particularly those most often marginalised by and within the school system.

Some of the papers focus on the role of policy within contexts that are seen as being in the vanguard of progress in relation to equity and inclusion. For example, the province of New Brunswick in Canada is frequently quoted as an example of a system that has pioneered the concept of inclusive education through legislation, local authority policies and professional guidelines. In their account of these developments, AuCoin and her colleagues (2020[16]) explain that change has been a difficult process that has involved developments over many years. Writing about Italy, another country recognised for its progress in relation to inclusive education, Ianes and his colleagues (2020[17]) explain how, in 1977, the Italian government passed a law that closed all special schools, units, and other non-inclusive education provisions. While thinking and practice varies from place to place within Italy, the principle of inclusion is widely accepted, although, as in Portugal, challenges remain in respect to the development of inclusive practices within schools. This is a reminder that this kind of far reaching educational reform requires consistent efforts over many years.

Many of the difficulties with reform efforts reported in the Prospects journal on the theme of "Inclusive education: New developments, new challenges"[5] had their origins in a lack of shared understanding as to the intended outcomes of a reform process. Given that change requires coordinated efforts across the different levels of an education system, an agreed and clear purpose is an essential condition. Reaching the required degree of clarity is both a cultural and political process in which certain voices might be excluded, while others over privileged, and in which underpinning assumptions need to be challenged.

In relation to these varied international situations, the progress made in Portugal regarding clarity of purpose represents an important achievement, as explained by Alves and her colleagues in their Prospects article. International research literature on educational change points to clarity of purpose as a crucial factor in ensuring that reforms are implemented in relation to school organisation, teacher attitudes and classroom practices (Ainscow, Chapman and Hadfield, 2020[18]; Hargreaves et al., 2010[19]).

Almost all students are placed in mainstream schools, which have significant resources for supporting their involvement

Current arrangements

As noted above, the national legislation places Portugal at the forefront of global efforts to promote equitable and inclusive educational arrangements. As a result of a reform process over the last three decades, it means that, nowadays, relatively few students are educated in separate school settings. Also, from a comparative cross-country perspective, class sizes are relatively small. For example, in public lower secondary institutions, there are 22 students per class in Portugal, compared to 23 students per class on average across OECD countries (OECD, 2020[20]). Furthermore, these may be reduced to 20 students in pre-primary, first, second and third cycle classes, as well as in vocational classes, when they include students seen as needing additional measures to support their learning. There remains, however, a small number of special schools, serving 1 % of students (see Chapter 1).

In addition, there are well-established arrangements for integrating newly arrived immigrant students. In particular, newly arrived students are provided with additional classes of Portuguese as a second language to facilitate their integration in mainstream classes. In line with the guiding principles of the educational policy, specific measures have also been implemented to ensure access and improve the educational success of newly arrived immigrant children and youths and, more recently, of refugees, in primary and secondary education.

Despite these impressive accomplishments, as noted in Chapter 1, differences in student outcomes persist for students from lower socio-economic backgrounds, families with low levels of parental education, immigrant students and other vulnerable groups. It is also worth noting that Portugal has a significant proportion of its students in fee-paying schools.

Providing support

It is intended that, as far as possible, measures to support the learning and inclusion of particular students should be implemented in the context of the mainstream classroom, even when the intervention requires the presence of a support teacher. However, it is still possible for some students to be sometimes taken out of the classroom in order to receive support.

As noted earlier in this chapter, the legislation requires that each school should have a multidisciplinary team to promote inclusive education for particular students, with both permanent and variable members. Once the need for measures to support the learning and inclusion of a student has been identified, the school director requests the multidisciplinary team to prepare an individual technical-pedagogical report. This report substantiates the mobilisation of selective or additional support measures for learning.

The multidisciplinary teams are required to adopt a holistic view, considering the academic, behavioural, social and emotional aspects of the student, as well as environmental factors, particularly linked to the school and classroom settings. They are also expected to collect evidence that make clear information available to match the teaching and learning process to each student's levels of achievement. The review team considers these teams to be fundamental school-level actors. In spite of some current weaknesses (see also Chapter 3), they have a considerable potential to deal with diversity and promote equity and inclusion in schools. Later in this chapter recommendations are made as to how these arrangements might be further developed in order to support the promotion of inclusive classroom practices.

The cluster system offers potential to coordinate school-to-school support for efforts to promote the development of inclusive practices

Local collaboration

The well-established pattern of schools working in clusters is a particular strength in relation to the promotion of inclusive practices and forms of organisation that support the introduction of these ways of working. Many other countries are seeking to establish similar arrangements, building on research suggesting that collaboration between schools has an enormous potential for fostering their capacity to respond to student diversity (Bryk, Gomez and Grunow, 2011[21]; Muijs et al., 2011[22]; Fielding et al., 2005[23]). More specifically, research shows how such partnerships can help to reduce the polarisation of schools, to the particular benefit of those students who are marginalised at the edges of the education system, and whose progress and attitudes to schooling cause concern (*Ibid*.).

There is also evidence that when groups of schools seek to develop more collaborative ways of working, this can have an impact on how teachers perceive themselves and their work (Little and McLaughlin, 1993[24]; Day et al., 2007[25]). Specifically, exposure to practices in different schools can lead teachers to view underachieving students in a new light (Ainscow et al., 2012[26]). In this way, students who cannot easily be educated within a school's established routines are less likely to be seen as 'having problems' but as challenging teachers to re-examine their practices to make them more responsive and flexible. Later in this chapter recommendations are made as to how further networking between clusters might be encouraged.

A further area of potential strength is the active involvement of community representatives in policy formulation within school clusters, including the appointment of school directors. These arrangements provide a sound basis for engaging community partners in collaboration to support the promotion of equity and inclusion within a cluster.

Social capital

The idea of schools cooperating underlines the potential importance of the Portuguese school clusters, which the review team sees as a major strength. From discussions with many stakeholders, the team came to the conclusion that these organisational structures can have an important role in the promotion of equity and inclusion within schools in their local areas. A helpful theoretical interpretation that can be made of the potential of this role is that they can help to strengthen social capital (Putnam, 2000[27]). In other words, they can be used to create pathways through which expertise and lessons from innovations can be spread across local education systems.

Social capital exists when there is trust between a school and its various stakeholders (Hargreaves, 2012[28]). It is about the extent and quality of the networks among its members – between directors and staff, staff and students, teachers and parents – as well as the school's links with external partners. A school that is rich in social capital has a strong sense of itself as a community, with ties to other communities; it also understands the importance of knowledge-sharing (Hargreaves, 2010[29]). As a result, the best professional practices are not trapped within the classrooms of a few outstanding teachers but are the common property of all who might benefit from them.

Writing about the United States, Putnam (2000[27]) states that "what many high-achieving school districts have in abundance is social capital, which is educationally more important than financial capital" (p. 306[27]). He also suggests that this can help to mitigate the insidious effects of socio-economic disadvantage. Reflecting on his work with schools serving disadvantaged communities in the United States, Payne (2008[30]) comes to a similar conclusion. Thinking specifically about school contexts that are characterised by low levels of social capital, he argues:

"Weak social infrastructure means that conservatives are right when they say that financial resources are likely to mean little in such environments. It means that expertise inside the building is likely to be underutilized, and expertise coming from outside is likely to be rejected on its face. It means that well-thought-out programmes can be undermined by the factionalised character of teacher life or by strong norms that militate against teacher collaboration" (p. 39[30]).

Mulford (2007[31]) suggests that by treating social relationships as a form of capital they can be seen as a resource, which can then be drawn on to achieve organisational goals. There are, he explains, three types of social capital, each of which throws further light on the processes that could be developed within an education system:

- *bonding social capital*, which relates to what can happen amongst work colleagues within a school
- *bridging social capital*, which refers to what can occur between schools through various forms of networking and collaboration
- *linking social capital*, which relates to the relationships between a school and wider community resources.

The evidence generated through this review of the Portuguese education system suggests that a major factor in determining success in promoting equity and inclusion in classrooms will be an ability to strengthen social capital within schools, between schools, and between schools and their communities. As explained later in this chapter, the task of those involved in leadership roles is, therefore, to create the climate that will support such developments. The school clusters in Portugal are important vehicles for making this happen. Stronger links between clusters within a local district will help to extend these arrangements. However, as argued later in this chapter, this will need effective and sensitive coordination amongst stakeholders at the local level.

Challenges

In building on these strengths, during the next phase of policy development Portugal will need to address a series of challenges related to the implementation of policies for promoting equity and inclusion at the level of schools. Most importantly, these include the following:

There is unequal implementation of the inclusive education policy framework at the school and local levels

Variations

During virtual meetings with stakeholders and school visits, the OECD review team gained a strong impression that there are considerable variations between schools, school clusters and localities across the country in regard to the ways in which the principles of equity and inclusion are being implemented. This suggests that local factors are influencing the ways in which the policy is being interpreted and acted upon.

This can be anticipated given the findings of international research which argues that reforms require understanding of the aims and purposes at all levels of an education systems (Fullan, 2007[12]), not least at the classroom level, where, as far as their students are concerned, teachers themselves are policy makers (Ball, 2010[32]). It is also important to remember that the promotion of equity and inclusion in education is not simply a technical or organisational change – it is a movement in a clear philosophical direction (UNESCO, 2017[33]). Therefore, moving to more inclusive ways of working requires changes in thinking and practices across all levels of the education system. These changes span from shifts in policy-makers' values and ways of thinking, which enable them to provide a vision shaping a culture of inclusion, to significant changes within schools, classrooms and communities.

The establishment of a culture of inclusion in education therefore requires a shared set of assumptions and beliefs amongst policy makers and senior staff at the national, district and school level that value differences, believe in collaboration and are committed to offering educational opportunities to all students (Ainscow, 2016[34]). However, changing the cultural norms that exist within an education system is difficult to achieve, particularly within a context that is faced with many competing pressures and where practitioners tend to work alone in addressing the problems they face (Ainscow, Chapman and Hadfield, 2020[18]).

This points to the importance of the contributions of those in management roles, at both the school and municipal levels. Again, evidence collected by the review team suggests that there is considerable variation within Portugal in relation to the effectiveness of leadership practices across the country. At the same time, the review team had the opportunity to meet some senior staff in schools, particular school leaders, who seem to be providing dynamic leadership, despite feeling somewhat isolated from opportunities to learn from and with colleagues involved in similar work in other clusters.

Student diversity and segregation

Evidence from PISA 2018 suggests that there are variations in the student composition and social segregation across education settings in Portugal. In particular, PISA measures student diversity and social segregation through the no social diversity index, which assesses whether the diversity of students within schools reflects the diversity of students at the country-level. The index ranges from 0, no segregation, to 1, full segregation. Figure 4.4 shows that Portugal scores slightly higher than the OECD average in terms of social segregation, with a no social diversity index equal to 0.15 in Portugal and 0.14 on average across OECD countries. When weighting social segregation by the size of public and private sectors, the variation across public schools was higher than across private sectors, with a no social diversity index equal to 0.10 and 0.05 respectively (OECD, 2019[35]).

Figure 4.4. Public and private schools, and social segregation across schools (PISA 2018)

Decomposition of the no social diversity index based on the contributions of public and private schools
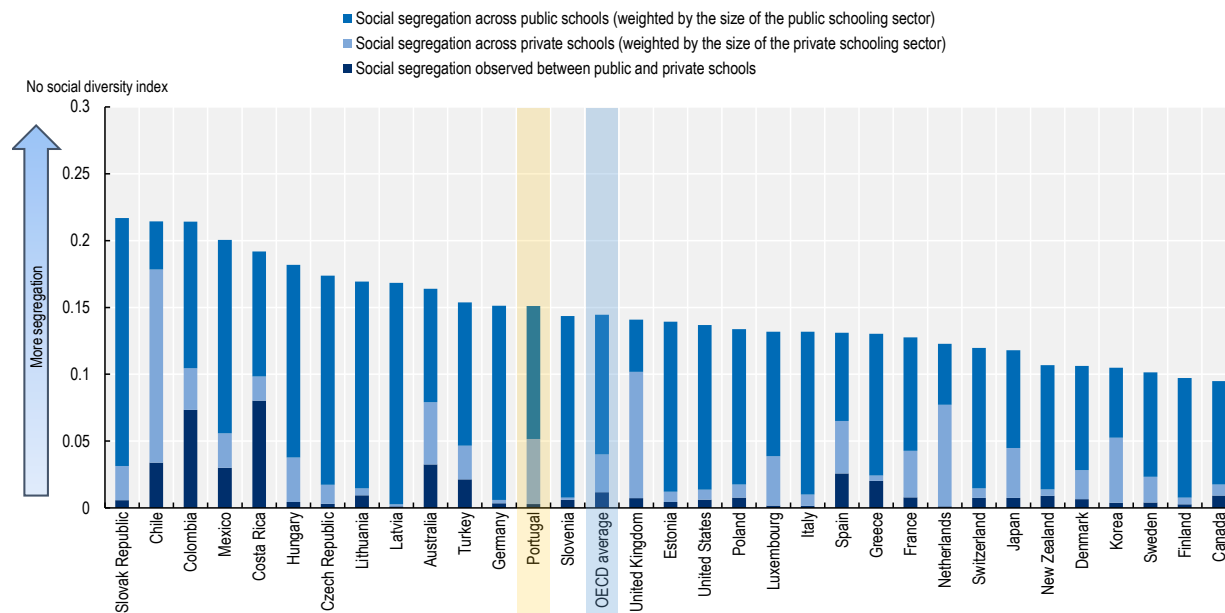
Note: The no social diversity index measures whether the diversity of students observed within schools reflects the diversity of students observed at the country/economy level. The index ranges from 0 to 1, with 0 corresponding to no segregation and 1 to full segregation. Countries and economies are ranked in descending order of the overall level of segregation.
Source: Adapted from OECD (2019[35]), *PISA 2018 Results (Volume II): Where All Students Can Succeed*, Figure II.4.7, https://doi.org/10.1787/b5fd1b8f-en.

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Meanwhile, a combination of factors - including lack of school choice and housing policies - has led to the creation of some Portuguese schools with particularly high concentrations of students from socio-economically disadvantaged backgrounds (OECD, 2018[8]). Similarly, students with an immigrant background and from Roma communities tend to be located in schools in particular municipalities/parishes. The review team also heard accounts of the many challenges facing these schools, including difficulties they experience in appointing and retaining suitably qualified teachers.

These difficulties reflect similar challenges experienced in a number of countries across the world, which suggest that market approaches to education improvement can create barriers to achieving educational equity and social justice. However, there is very little school choice in Portugal, since most students usually attend state schools which are close to their place of residence.

In relation to this issue, the review team heard views suggesting that one of the most important challenges faced by the Portuguese education system is that of including students from Roma communities, as noted earlier in this report (see Chapter 1). Moreover, evidence provided by national and international studies invariably suggests that the inclusion of Roma students is a significant concern in most European countries, including Portugal (Rutigliano, 2020[36]). This seems to be related, in part, to prejudices and stereotypes that still exist within Portuguese society. There is also said to be a continued lack of awareness and mistrust between Roma and non-Roma people, which, from time to time, creates tensions and misunderstandings between students, teachers and families (Araújo and Brito, 2018[37]).

These patterns are further compounded by variations in the provision of additional resources to support efforts to implement equitable and inclusive arrangements. Here, the Priority Intervention Education Territories (*Territórios Educativos de Intervenção Prioritária*, TEIP), referred to in Chapter 2, is a significant initiative. Currently, TEIPs involve 137 school clusters located in districts with high levels of poverty and social exclusion (about 17% of the total). Schools in these areas have additional resources to support the implementation of three-year improvement plans that are focused on four priorities:

- improvements in teaching and learning
- prevention of early school leaving, absenteeism and indiscipline
- school management and organisation
- relationships between school, families and communities.

Clearly, there are lessons from these experiences that could be used to inform wider improvement initiatives across Portugal. At present, however, it is unclear how the sharing of expertise can be facilitated, which points to the importance of local monitoring and coordination, an area discussed later in the chapter.

Local monitoring

Related to this concern about the need for better local monitoring and coordination, the review team also heard reports indicating that there are ineffective strategies in place for monitoring schools to identify and intervene in the contexts that are a cause for concern. This is supported by evidence from PISA 2018 which shows that Portugal had a lower percentage of students whose principals reported their schools had mandatory quality assurance and improvement functions than the OECD average. However, when looking at school-level initiatives to promote these functions, the percentage of students whose principals stated to have such initiatives was higher than on average across OECD countries (OECD, 2020[7]). These functions include internal evaluation/self-evaluation, systematic data recording (e.g. on student outcomes, teacher or student attendance, professional learning), systematic recording of students' test results and graduation rates and seeking written feedback from students (see Figure 4.5).

Figure 4.5. Quality assurance and improvement actions at school (PISA 2018)

Results based on principals' reports
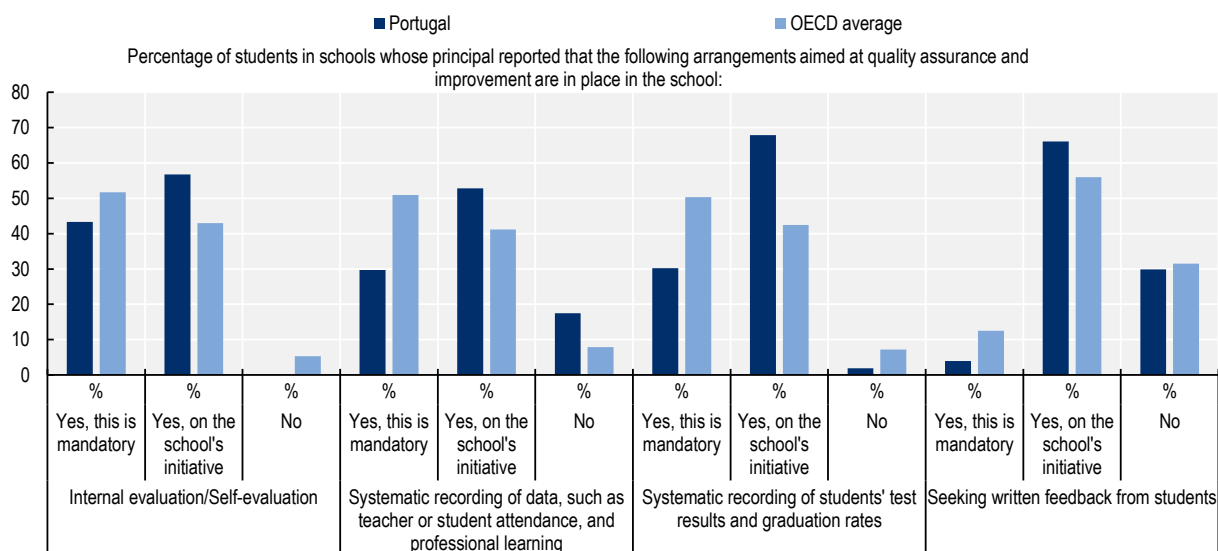
Source: OECD (2020[7]), *PISA 2018 Results (Volume V): Effective Policies, Successful Schools*, Table V.B1.8.11., https://doi.org/10.1787/ca768d40-en.

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Learning and teaching strategies that do not reflect the new paradigm

School-level implementation

Like all major policy changes, progress in relation to equity and inclusion requires an effective strategy for implementation. In particular, it requires new thinking that focuses on the barriers experienced by some children and young people that lead them to become marginalised as a result of contextual factors, such as inappropriate curricula and forms of assessment, and inadequate teacher preparation and support (Ainscow, 2020[38]). The implication is that overcoming such barriers is the most important means of developing forms of education that are effective for all students. In this way, the focus on equity and inclusion has the potential to become a way of achieving the overall improvement of education systems (OECD, 2012[39]).

There is not one single model of what an inclusive school looks like. What is common to highly inclusive schools, however, is that they are welcoming and supportive places for all of their students, not least for those with special education needs and others who experience difficulties (Dyson, Howes and Roberts, 2004[40]). This does not prevent these schools from also being committed to improving the achievements of all of their students. However, this requires organisational flexibility and the active support of senior staff, prepared to encourage and support processes of experimentation (Riehl, 2000[41]).

Within the new policy framework, Portuguese schools have increased autonomy. Indeed, flexibility and autonomy are seen as key concepts in the design and implementation of curricula and educational activities (see Chapter 2). The overall impression of practice gained by the review team is a degree of variation in the ways in which schools carry out their work, albeit within a system that is still relatively centralised, and where examinations and university entrance requirements are influential, particularly as

students get older. As reported by the OECD (2018[8]), this leaves Portuguese school leaders facing a dilemma when designing the curriculum: "teaching for the national exam versus promoting active learning, formative assessment and other pedagogies" (p. 33[8]).

Classroom practices

The impression gained by the review team is that classroom practices vary considerably, within and between schools. For example, some examples were noted of teachers using the sorts of collaborative learning approaches that are known to encourage greater participation amongst students. Meanwhile, some teaching involves a step-by-step pattern, following workbooks, usually chosen at the cluster level. The concern is that this approach may restrict the discretion of teachers to vary their practices in response to student diversity. There is also a worry expressed by some respondents that these books may not show sufficient sensitivity to the diversity that exists within the community. In some schools, it was noted that limited use is made of displays of student work, on classroom walls and around corridors. Again, such arrangements can help to create a climate where students feel valued for their contributions.

In thinking how best to promote inclusive practices it is important to recognise that teaching is a complex and often unpredictable endeavour that requires a degree of improvisation (Huberman, 1993[42]). Indeed, a significant hallmark of an inclusive school is the degree to which the teachers are prepared to adjust their practices in the light of the responses of members of their classes. Consequently, teachers must have sufficient autonomy to make instant decisions that take account of the individuality of their students and the uniqueness of every encounter that occurs (Wiliam et al., 2004[43]). Therefore, what is needed is a well-coordinated, cooperative style of working that gives individual teachers the confidence to improvise in a search for the most appropriate responses to all the students in their classes (Ainscow et al., 2006[44]).

Opportunities for professional learning must therefore be an essential element of the strategy for implementing the new thinking through the introduction of inclusive classroom practices and organisational conditions that support teachers in developing such ways of working. As noted in Chapter 3, within Portugal there exists a well-established pattern of in-service teacher training courses. The concern of the review team, however, is that, for some teachers at least, this seems to be a means of recording their career progression and that it could become an exercise in "box ticking" of activities completed, rather than as a stimulus for innovations regarding hard-to-reach students.

School-based professional learning

Evidence from international research suggests that professional learning activities are likely to be more powerful if they are situated within schools in ways that build on existing practice (Avalos, 2011[45]; Cordingley et al., 2005[46]; Earley and Porritt, 2014[47]). This can also encourage "joint practice development", which Fielding and colleagues (2005[23]) define as learning new ways of working through mutual engagement that opens up and shares practices with others. They suggest that joint practice development involves interaction and mutual development related to practice; recognises that each partner in the interaction has something to offer; and is research-informed, often involving processes of collaborative inquiry.

Through such collaborative activities within schools, teachers develop ways of talking to one another that enable them to articulate details about their practices. In this way, they are able to share ideas about their ways of working with colleagues. This also assists individuals to reflect on their own ways of working, as well as the thinking behind their actions (Brussino, 2021[48]). Again, the school clusters could provide a context for these activities, using the existing training centres to coordinate them. However, the review team found little evidence of this form of school-based professional learning being undertaken as part of school development strategies. These topics are developed later in this chapter.

In spite of organisational strengths, such as the school clusters, there is limited collaboration across the education system

The importance of collaboration

The Portuguese reforms require changes in organisational arrangements and practices that will lead them to respond positively to student diversity – seeing individual differences not as problems to be fixed but as opportunities for enriching learning. Within such a conceptualisation, a consideration of difficulties experienced by students can provide an agenda for improvement and insights as to how changes might be brought about. However, this kind of approach requires an emphasis on collaboration that encourages and supports collective problem solving (Skrtic, 1991[49]; Robinson, 1998[50]).

During the visits, the review team heard many positive examples of informal and structured collaboration amongst schools and within clusters that can be built upon. However, some of those spoken to suggested that, overall, collaboration is not a strength of the education system. And, during the visits no examples were found of school-based collaborative professional development activities being organised.

This relative weakness was referred to in regards to different levels of the system: amongst school staff, within school clusters and between municipalities. Mention was also made of school staff lacking the time to create and participate in collaborative activities, which points to the importance of strategic leadership in making this happen.

This reflects the analysis presented in the TALIS 2018 report which states that only 5% of Portuguese teachers report participating in collaborative professional learning at least once a month (OECD average 21%) and 23% engage in team teaching with the same frequency (OECD average 28%) (OECD, 2019[4]). Relevant to the recommendations made later in this chapter, these impressions are supported by a recent study in Portugal (Silva, Amante and Morgado, 2017[51]), which concludes that schools with a positive school climate are more likely to have teachers who diversify their teaching strategies and collaborate with colleagues resulting in stronger academic performance in students.

It is important to stress, too, that the need for greater collaboration must stretch beyond schools. The review team met representatives of many voluntary organisations, including some who work with families, young people and minority communities, who could more actively contribute to the promotion of equity and inclusion in schools. All these stakeholders mentioned the work they are doing in their localities. At the same time, many of them expressed frustration that their voices were too often ignored, and that the work they do is not fully recognised and acted upon.

Additional resources that are intended to support the promotion of inclusion seem to be mainly focused on strategies that encourage separate arrangements for some students

The roles of specialist support staff

As noted above, the move towards equity and inclusion in education represents a paradigm shift in relation to how student diversity is addressed within Portuguese schools. Therefore, despite the impressive progress that has been made, it is unsurprising that this change is taking time to implement given that the key change agents – classroom teachers and support staff – are busy carrying out their duties. Hence, this highlights the importance of an investment in professional learning for all staff.

This has particular implications for the specialised support staff that are there to ensure the presence, participation and achievement of more vulnerable students. Over recent years, these staff members have seen their roles change to promote more inclusive arrangements. However, the impression gained by the

review team, through interviews and school visits, is that these organisational arrangements have not been matched by changes in the thinking and practices of many of the staff involved.

Alves and her colleagues (2020[5]) explain that specialised support in Portuguese mainstream schools is usually provided by special education support teachers, professionals linked to local CRIs, or specialised professionals hired directly by the schools. Specialised support staff provides a range of therapeutic supports, including psychological support as well as speech, occupational, and rehabilitation/physical therapy.

Much of this support is provided individually or for small groups of students outside of the mainstream classroom. These responses involve the continued use of what is sometimes referred to as a "medical model" of assessment, within which educational difficulties are explained mainly in terms of a student's deficits (Brussino, 2020[52]). This prevents progress in the field, not least because it distracts attention from questions about why schools fail to teach so many students successfully (Slee, 2010[53]).

A social model

In contrast to the medical model, the orientation that informs the Portuguese reforms is informed by a "social model" for responding to student differences. Rather than focusing on the characteristics of students, this involves an assessment of contextual barriers facing some students and an identification of resources, particularly human resources, that can be mobilised to overcome these difficulties (Ainscow et al., 2006[44]; Brussino, 2020[52]). In this context, staff with specialist expertise have key roles to play, not least in working collaboratively with classroom teachers to develop inclusive ways of working. However, they will need professional learning and support as they take on this different work.

Strategies for encouraging inclusion that depend on practices imported from the tradition of special education can foster new and more subtle forms of segregation, albeit within mainstream settings (Ainscow et al., 2006[44]). At the same time, parents may resist efforts to withdraw this form of individual support for their children. In this way, parental attitudes can be an obstacle to efforts to promote inclusion, as noted in UNESCO's 2020 Global Education Monitoring Report. Meanwhile, the requirement for individualised education plans – mandated by legislation in some countries – has led some school leaders to feel that many more students will require such responses, thus creating budget problems within some education systems (Kefallinou, Symeonidou and Meijer, 2020[54]).

The recognition that inclusive schools will not be achieved by transplanting special education thinking and practice into mainstream contexts opens up new possibilities. Many of these relate to the need to move from the individualised planning frame to a perspective that seeks to personalise learning through an engagement with the whole class, using approaches such as co-operative learning. The next phase of policy implementation in Portugal will need to support this move in relation to thinking and practice at the level of schools.

Student involvement

Research indicates that the active involvement of students can be an effective way of supporting the development of inclusive learning contexts (Fielding, 2001[55]; Cook-Sather, 2006[56]). In particular, there is strong evidence of the potential of approaches that encourage cooperation between students for creating classroom conditions that can both maximise participation in planned activities, while at the same time achieving high standards of learning for all members of a class (Ainscow and Messiou, 2017[57]). Furthermore, this evidence suggests that such practices can be effective in supporting the involvement of all students who are facing vulnerable situations, such as those who are newly arrived in a class, students from different cultural and language backgrounds, and those who are experiencing difficulties in learning (Johnson and Johnson, 1989[58]).

During the school visits, the discussions with students proved to be particularly informative, providing yet further evidence of the potential of their views to provide insights into the life of a school. The review team also heard encouraging accounts of how this thinking is being used effectively in some Portuguese schools. This is an example of how existing practices can be used to stimulate similar developments across the country.

Procedures for monitoring and evaluating the development of inclusive practices are under-developed

The role of evidence

Portugal has a well-established system for using statistical data to monitor the impact of policy in the field. Consistent with the principle that it is not necessary to categorise in order to intervene, this system focuses on the level of support provided for students, which reflects the principle that "all students are equal". However, the impression gained by the review team is that the use of evidence for monitoring and evaluating the implementation and impact of the national reform agenda at the local area and school levels is not well developed. This is a significant weakness that appears to be obstructing progress in the field.

As noted by the 2020 Global Education Monitoring Report (UNESCO, 2020[2]), evidence is vital in order to address concerns about access and equity within local education systems. In particular, it is important to know who is included, who is segregated, and who is excluded from schooling within particular contexts. Without such evidence, there can be no accountability.

To ensure accountability, there is a need for evidence in relation to the many different forms that exclusion can take, such as (UNESCO, 2012, p. 13[59]):

- **Exclusion from having the life prospects needed for learning,** e.g. living under inadequate health and well-being conditions, such as inadequate housing, food, and clothing, limited security and safety.
- **Exclusion from entry into a school or an educational programme**, e.g. being unable to pay entrance fees and tuition fees; being outside the eligibility criteria for entry; dressed in ways considered inadmissible by the school.
- **Exclusion from regular participation in school or an educational programme,** e.g. living too far to attend regularly; being unable to continuously pay for participation; being sick or injured.
- **Exclusion from meaningful learning experiences,** e.g. teaching and learning process not meeting students' needs; not comprehensive the language of instruction and learning materials ; the student goes through uncomfortable, negative and/or discouraging experiences at school or in the programme, such as discrimination, prejudice, bullying, violence.
- **Exclusion from a recognition of the learning acquired,** e.g. learning acquired in a non-formal programme not recognised for entry to a formal programme; learning acquired is not considered admissible for certification; learning acquired is not considered valid for accessing further learning opportunities.
- **Exclusion from contributing the learning acquired to the development of community and society,** e.g. learning acquired is considered to be of little value by society; the school or programme attended is seen to have low social status and is disrespected by society, limited work opportunities; discrimination in society on the basis of socially ascribed differences that disregards any learning acquired by the person.

Engaging with evidence on these challenging issues, some of which are difficult to identify, has the potential to stimulate the search for effective ways of promoting the presence, participation and progress

of all students. Data on contextual factors are therefore needed, including an analysis of policies, practices and settings, as well as attitudes and social relationships.

However, as is widely recognised within Portugal, when data collection efforts are only focused on particular categories of students, there is a risk of promoting deficit views of students who share certain characteristics or come from similar backgrounds. As a result, the focus may be on "what is wrong with the student", rather than more fundamental questions, such as investigating the reasons behind the system failing some students, or the barriers experienced by some of students. Analysing the evidence regarding these challenging questions, including the views of students and their families, has the potential to stimulate efforts to find more effective ways of promoting the participation and progress of all students (Ainscow and Messiou, 2017[57]). This theme is further developed in the following section of the chapter.

Policy recommendations

Taking account of the analysis of strengths and challenges provided above, this section of the chapter articulates four policy recommendations for strengthening school-level responses to promote equity and inclusion. While these recommendations are far reaching, they could be introduced as part of the next phase of the reform process.

A central theme is that of making better use of the expertise that already exists within the education system. This will require an adjustment in the overall approach to implementation, one that gradually moves from an emphasis on centralised decision-making towards an approach that is led at the school and local area levels. It is suggested that these recommendations should be introduced as part of a shorter-term process over the next three years or so.

Introduce a programme of professional learning that is focused on the promotion of inclusive classroom practices

Developing inclusive practices

A central challenge for the Portuguese education system as it moves forward with its reform agenda will concern the development of inclusive classroom practices in every school. This also has significant implications for those involved in leadership roles at the school level. It means that school leaders will have to stimulate and coordinate professional learning amongst their staff to develop inclusive practices. It will also require a gradual adjustment in the strategy for supporting implementation of the reform policy, one that moves towards a greater emphasis on school-led developments and local area coordination.

Research suggests that teachers who are effective in providing experiences that facilitate the participation of all students taking into account their individual learning styles pay attention to key aspects of classroom life (Florian, Black-Hawkins and Rouse, 2016[60]). First, teachers recognise that the initial stages of any lesson or activity are particularly important if students are guided to understand the purpose and meaning of what is to occur. Specifically, effective teachers aim to help their students to recall previous experiences and knowledge to which new learning can be connected. Another key element is how some teachers use available resources to stimulate and support participation. Most significantly, effective teachers seem to be aware that the two most important resources for learning are themselves and their students (Ainscow, 1999[61]).

The idea of using the potential of students as a resource for one another seems to be a particularly powerful strategy for developing inclusive learning but, regrettably, it is one that is often overlooked (Johnson and Johnson, 1989[58]). A striking feature of lessons that encourage participation is the way in which students are often asked to think aloud, sometimes with the class as a whole as a result of the teacher's sensitive questioning, or with their classmates in well-managed small group interactions

(Ainscow, 1999[61]). All of this provides opportunities for students to clarify their own ideas, while, at the same time, enabling members of the class to stimulate and support one another in their learning process (see Box 4.1).

> ### Box 4.1. Co-operative learning
>
> The use of co-operative group work in some countries has illustrated its potential for creating classroom conditions that can both maximise participation, while at the same time achieving high standards of learning for all students.
>
> There is strong evidence to suggest that where teachers are skillful at planning and managing the use of co-operative group learning activities as part of their repertoire, this can lead to improved outcomes in terms of students' academic, social and psychological development. These approaches have also been found to be an effective means of supporting the participation of diverse students, including those who are new to a class, students from different cultural or linguistic backgrounds, and those with special education needs.
>
> However, it is important to stress the need for skills in orchestrating this type of classroom practice. Poorly managed group approaches usually lead to less efficient time management and can present many opportunities for increased disruption.
>
> Source: Johnson & Johnson (1989[58]), *Leading the co-operative school*.

This argument for greater use of collaborative learning is highlighted by evidence from TALIS 2018. It notes that, in Portugal, only 49.9% of teachers included in TALIS 2018 reported to frequently or always have students working in small groups to come up with a joint solution to a problem or task (OECD, 2019[4]). While this value does not differ substantially from the average across OECD countries, namely 50.1%, it suggests the significant room for growth for Portuguese schools to engage students in collaborative learning more frequently (see Figure 4.6).

Figure 4.6. Teaching practices (TALIS 2018)

Results based on responses of lower secondary teachers

Percentage of teachers who reported that they "frequently" or "always" have students work in small groups to come up with a joint solution to a problem or task
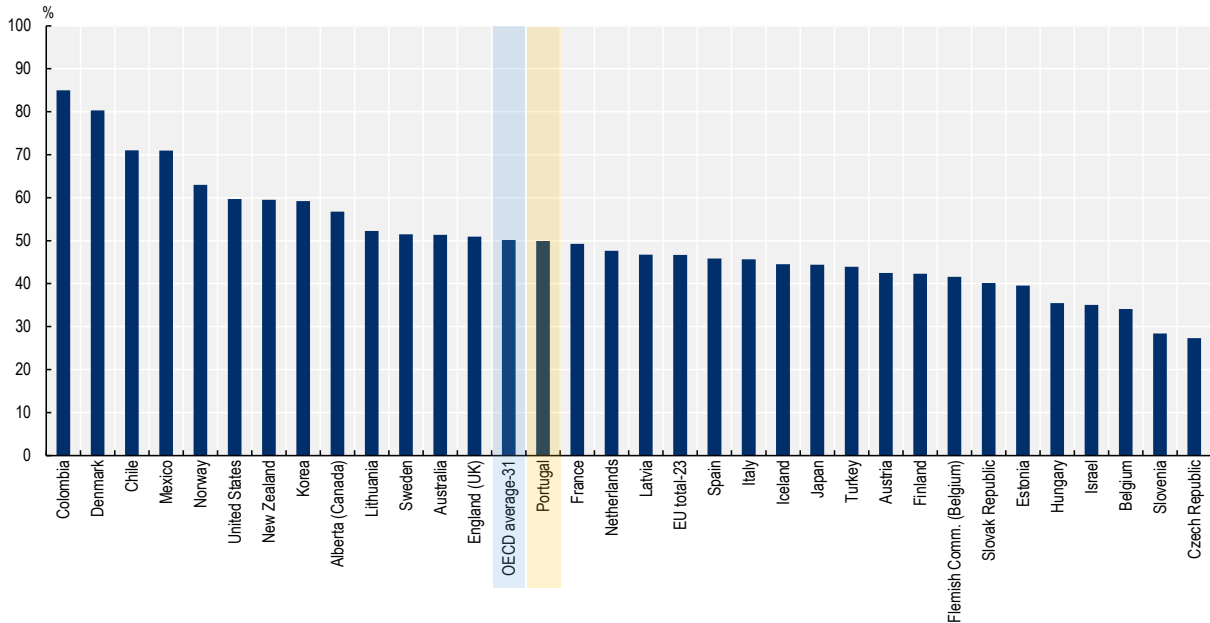
Notes: These data are reported by teachers and refer to a randomly chosen class they currently teach from their weekly timetable.
OECD average-31: arithmetic average based on ISCED 2 teacher data across 31 OECD countries and economies with adjudicated data. The report refers to the average teacher "across the OECD" as equivalent shorthand for the average teacher "across the 31 OECD countries and economies participating in TALIS".
Source: OECD (2019[4]) *TALIS 2018, Results (Volume I): Teachers and School Leaders as Lifelong Learners*, Table I.2.1
https://dx.doi.org/10.1787/1d0bc92a-en.

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Developing the expertise of teachers

As the Portuguese education system becomes more inclusive, professional learning will be particularly important, not least because of new major challenges that teachers face as they are required to respond to a greater diversity of students in their classes.

Reflecting on the findings of UNESCO's 2020 Global Education Monitoring Report, which investigated social, economic and cultural mechanisms that discriminate against disadvantaged children, youth and adults, Antoninis et al. (2020[62]) argue that all teachers should be prepared to teach all students. They state:

"Inclusive approaches should not be treated as a specialist topic but as a core element of teacher education, whether initial education or professional development. Such programmes need to focus on tackling entrenched views of some students as deficient and unable to learn. Head teachers should be prepared to implement and communicate an inclusive school ethos. A diverse education workforce also supports inclusion" (p. 105[62]).

Similarly, specialist support staff who find the context and focus of their work changing in major ways will also need ongoing professional learning. International research (Avalos, 2011[45]; Cordingley et al.,

2005[46]; Earley and Porritt, 2014[47]) suggests that, in order to make a difference in respect to practice and student outcomes, professional learning must:

Take place primarily in classrooms, where practice is developed to

- connect to and build on the expertise available within the school, making connections with existing knowledge
- create co-operative spaces where teachers can plan together, share ideas and resources and have opportunities to observe one another working
- engage teachers in developing a common language of practice that assists individuals in reflecting on their own ways of working, on the thinking behind their actions and on how to improve.

Sharing practices amongst staff within a school is a particularly effective means of encouraging professional learning (Butler and Schnellert, 2012[63]; Hiebert, Gallimore and Stigler, 2002[64]). It is therefore important that practitioners collaborate with and support their colleagues in reflecting on their practices and building team knowledge and skills (see Box 4.2).

Box 4.2. Teachers learning from teachers

The Pirtti school, located in the city of Kuopio in Finland, has established a co-teaching arrangement that promotes co-operative learning and teamwork in planning, teaching and evaluation. This practice was used to combine a mainstream class and a special class of third grade students (i.e. 9 year-old students).

For a period of four years, the class was taught together and the teachers were jointly responsible for this group. Later, a similar partnership started between classes from the first and third grades, and this group was taught together by teachers for a period of six years.

A review of the practice found that teachers' motivation increased significantly. Teachers indicated that working together gave them the strength to manage and develop their work. Of course, this approach requires time for joint planning and seamless collaboration. Overall, the results showed benefits, not only for the teachers, but also for students and their parents.

Source: Bruun and Rimpiläinen (n.d.[65]), "Co-operative teaching for inclusion in Finland. Inclusive Education in Action: Empowering Teachers: Empowering", http://www.inclusive-education-in-action.org (accessed on 17 December 2021).

Strengthening collaboration

In introducing this form of school-based professional learning, it is important to keep in mind that much of what teachers do during the intensive encounters that occur in classrooms is carried out at an automatic, intuitive level. Furthermore, teachers have little time to stop and think. This is why having the opportunity to see colleagues at work is crucial to the success of attempts to develop practice. It is through shared experiences that colleagues can help one another to articulate what they currently do and define what they might like to do (Hiebert, Gallimore and Stigler, 2002[64]). It is also the means whereby space is created within which taken-for-granted assumptions about particular groups of students and what they might achieve can be subjected to mutual inquiry and reflection. This factor is crucial to the promotion of inclusive practices and is a feature of schools that make progress in relation to equity and inclusion (Ainscow, 2020[38]).

As a result of a review of publications on teacher professional learning, Avalos (2011[45]) highlights collaboration as an important facilitator for professional learning amongst teachers, in particular for altering or reinforcing teaching practices. Running through current thinking there is also an assumption

that practitioners have to take greater responsibility for their own professional learning. For example, Hayes (2000[66]) suggests that effective teacher learning can be promoted if and when used in line with collaborative and context-specific involvement of teachers, who have ownership over their personal development.

Walling and Lewis (2000[67]) argue that only in recent years teacher learning has been considered a continuing process, where growth and development opportunities are made available through planned experiences and opportunities within the context of general teaching activities. This has been identified as a "new paradigm" (Villegas-Reimers, 2003[68]).

A language of practice

The starting point for developing inclusive practices is therefore with the sharing of existing approaches through collaboration amongst staff, leading to experimentation with new practices that will reach out to all students (Ainscow, 2016[34]). Relevant to this, Lefstein, Vedder-Weiss and Segal (2020[69]) point to the importance of the conversations embedded in teachers' day-to-day work, through which they learn from one another what it means to be a teacher and how to perform their duties. These authors go on to explain how professional knowledge and skills, much of which are implicit, are learnt "on the job", through participation in work practices and informal interactions with colleagues. This means that professional knowledge is intimately related to the practices through which it is constructed and to which it is applied. Given the situated nature of knowledge, ideas constructed with colleagues at school are more likely to be used within a school, whereas ideas constructed within professional learning workshops and courses are only likely to be applied in the social practice of participating in such events.

This points to the importance of a shared professional language developed within a school, through with which colleagues can talk to one another and to themselves, about detailed aspects of their practice. Without such a language, teachers find it very difficult to experiment with new possibilities (Huberman, 1993[42]). An engagement with evidence is particularly crucial in providing the stimulus for professional learning aimed at the development of inclusive thinking and practice.

Particularly powerful techniques for generating evidence involve teachers using mutual lesson observation, sometimes through video recordings, and comments collected from students about teaching and learning arrangements within a school (Ainscow and Messiou, 2017[57]). Under certain conditions, such approaches provide "interruptions" that create opportunities for reflection that can stimulate self-questioning, creativity and action (Brussino, 2021[48]). In so doing, they can lead to a reframing of perceived problems that, in turn, draws the teacher's attention to overlooked possibilities for addressing barriers to participation and learning. In this way, differences amongst students, staff and schools become a catalyst for improvement (see Box 4.3).

> **Box 4.3. Engaging with the voice of students in *Canelas* school cluster, Vila Nova de Gaia (North)**
>
> At the school level, engaging with the views of students can lead to changes in understandings and practices and foster the development of an inclusive school culture (Ainscow and Messiou, 2017[57]). It can nonetheless be a challenging process that might require changes in pedagogies and mentalities (Ibid.).
>
> Portuguese schools provide some examples of practices that promote students' voice and initiatives. For instance, in the Canelas school cluster, students can design a project related to inclusion and/or human rights and ask the school for support to implement it. This school cluster also uses students' voice and experiences to strengthen inclusion. It has implemented a programme to discuss gender, gender minority and sexual orientation-related issues in which students organise the debates and teach other students.
>
> There is, nonetheless, still a long way to go. During the review team's visit, various students in different schools pointed out that they were rarely asked to share their views and that most decisions that impacted them were taken without previous consultation.
>
> Source: Information obtained during OECD Review team visit.

This raises questions about how best to introduce such forms of teacher learning. A promising approach that could be particularly relevant to Portugal is that of "lesson study", a systematic procedure for the development of teaching that is well-established in Japan and some other Asian countries (Hiebert, Gallimore and Stigler, 2002[64]; Lo, Yan and Pakey, 2005[70]; Stigler and Hiebert, 1999[71]). The goal of lesson study is to improve the effectiveness of the experiences that the teachers provide for all of their students (see Box 4.4). The core activity is collaboration on a shared area of focus that is generated through discussion. The content of this focus is the planned lesson, which is then used as the basis of gathering data on the quality of experience that students receive. These lessons are called "research lessons" and are used to examine teachers' practices and students' responsiveness to the planned activities. Members of the group work together to design the lesson plan, which is then implemented by each teacher. Observations and post-lesson conferences are arranged to facilitate the improvement of the research lesson between each trial.

> ### Box 4.4. Students helping teachers to innovate
>
> "Diversity in our school is now seen as an opportunity, when approached through collaborative work"
>
> "The exchange of ideas and research work in teams makes diversity evolve from a problem into a challenge"
>
> These are typical comments from teachers at *Escola Secundária Pedro Alexandrino* (ESPA), a secondary school situated in Lisbon. For these teachers, diversity is a central issue in their day-to-day work. Over recent years, the school has made many efforts to reflect this diversity. These have involved trios of teachers supporting one another in analysing how to make their lessons more inclusive. For example, one trio focused on this question: "Do all students participate in all the tasks of our lessons?"
>
> The findings from these activities led teachers to explore how students could be partners in education, participate in planning and, sometimes, teaching lessons. Teachers found that collaborating with their colleagues and with students has led them to think in new ways about how to best respond to student diversity. This enhanced collaboration also gave them greater confidence to experiment with different teaching practices.
>
> Source: Messiou et al. (2016[72]), "Learning from differences: a strategy for teacher development in respect to student diversity", *School Effectiveness and School Improvement,* 10.1080/09243453.2014.966726.

Engaging with evidence

Underlying these ways of using collaboration to promote equity and inclusion within schools is a common pattern. Most importantly, they involve an engagement with various kinds of evidence collected by practitioners, sometimes with support from university researchers. Usually, this begins with a consideration of an established set of practices that are largely taken for granted. An interruption occurs that problematises these practices and provokes consideration of why current practices are the way they are and how they might be improved. This may then lead to actual changes in practices. There are no compulsory requirements for initial teacher preparation to train prospective teachers for diversity, equity and inclusion.

Given the focus on developing more equitable and inclusive ways of working, this pattern entails two important questions:

- What is it that provokes the problematisation of established practice?
- Why does this necessarily lead to more inclusive ways of working?

In addressing these questions, it is helpful to draw on the idea of "communities of practice, as developed by Wenger (1998[73]), focusing specifically on the way he sees learning as "a characteristic of practice"". Wenger explains practice in terms of those actions that individuals within a community do, drawing on available resources, to achieve a set of shared goals. This goes beyond how practitioners complete their tasks to include, for example, how they make it through the day and deal with the pressures and constraints within which they have to operate. Thus, practices are ways of negotiating meaning through social action, which underlines the importance of the conversations embedded in teachers' day-to-day work, referred to earlier in this chapter.

In explaining this process, Wenger argues that communities "reify" their practices by producing concrete representations of them, such as tools, symbols, rules and documents (and even concepts and theories). However, these reifications have to be given meaning through a process of participation, which consists

of the shared experiences and negotiations that result from social interaction within a particular group. Wenger provides some helpful guidelines for judging whether a particular social collective can be considered as a community of practice. He argues that, since such a community involves mutual engagement, a negotiated enterprise, and a repertoire of resources and practices, then its members should be expected to:

- interact more intensively with, and know more about, others in the group than those outside the group

- hold their actions accountable (and be willing for others in the community to hold them accountable) more to the group's joint enterprise than to some other enterprise

- become more able to evaluate the actions of other members of the group than the actions of those outside the group

- draw on locally produced resources and artefacts to negotiate meaning, more so than those that are imported from outside the group (Wenger, 1998[73]).

Managing change

This relationship between practice and local meaning making suggests that external policy agendas cannot simply be imposed on communities of practice. Specifically, external proposals for change - such as the Portuguese reforms - however powerfully enforced, have to be endowed with meaning within local contexts before they can inform practice. This implies that schools (or, at least, the communities of practice within schools) may negotiate local meanings for those agendas that are different from those of the formulators themselves or, indeed, of other schools.

All of this has crucial implications for the way Portugal formulates its next phase of development in relation to equity and inclusion. Put simply, this will need powerful and well-managed strategies for managing change, particularly at the levels of schools and local areas.

This way of thinking is based on the idea that schools and their local communities have untapped potential to improve their capacity for improving the achievement of all of their students, not least those from socio-economically disadvantaged backgrounds and other vulnerable groups. The challenge therefore is to mobilise this potential. This reinforces the argument that moving towards the promotion of inclusive practices involves a social process with practitioners learning from one another, from their students, and from others involved in students' lives.

When reflecting on how this thinking might be used to support the implementation of the Portuguese reforms it is essential to recognise that it does not offer a straightforward recipe that can be lifted and transferred from place to place. Rather, it defines an approach to improvement that uses processes of contextual analysis to create strategies that fit particular circumstances (see, for example, the initiative described in Box 4.5). As explained above, this involves an engagement with various forms of evidence, leading to the development of locally determined improvement pathways. In this way, those involved probe beneath the surface of headline performance indicators to understand how local dynamics shape particular student outcomes. Doing so helps to identify barriers to progress as well as resources that can inject pace into efforts to progress. What is distinctive in the approach is that it is mainly led within schools, with senior school staff having a central role as 'system leaders' (Hopkins, 2007[74]). As argued earlier, this requires new thinking, practices and relationship across education systems.

Box 4.5. Every Dundee Learner Matters

In Scotland (United Kingdom), the city of Dundee has introduced a city-wide improvement strategy based on the principles of equity and inclusion. The aim is to improve the quality of education for all children and young people in the city. Developed and coordinated by a group of experienced head teachers, with support from local authority staff, the guiding vision is of a high performing system that is at the forefront of developments to find more effective ways of ensuring the progress of all students, particularly those whose progress is a cause for concern. Central to this vision is a system that is driven collectively by school leaders and involves practitioners at all levels in taking shared responsibility for improving the quality of education in all schools across the city.

The focus is on three intended outcomes: i) presence – ensuring that all children and young people attend regularly and promptly; ii) participation – creating a climate within nurseries and schools where all children and young people feel welcome and valued; and iii) progress – developing policies and practices that maximise the achievement and ambitions of all children and young people.

The Every Dundee Learner Matters strategy involves partnerships made up of three or four schools that are at different stages of development. Each school has a staff inquiry group that has responsibility for co-ordinating a process of school-based collaborative action research and development. In addition, occasional seminars are held for head teachers to support them in creating the organisational conditions necessary for the success of the strategy within their schools.

Source: Dundee City Council (2021[75]), https://www.dundeecity.gov.uk/news/article?article_ref=3971 (accessed on 18 November 2021).

A framework that can help in the promotion of an inclusive dialogue within a school, a group of schools or, indeed, across a local area, is provided by the Index for Inclusion (see Box 4.6, which explains its use in a Portuguese school), a review instrument developed originally for use in England (United Kingdom) but now available in many languages, including Portuguese (Booth and Ainscow, 2002[76]).

The Index is intended to help draw on the knowledge and views of teachers, students, parents/guardians and community representatives about barriers to participation that exist within the existing cultures, policies and practices of schools to identify priorities for change. In connecting inclusion with the detail of policy and practice, the Index encourages those who use it to build their own view of inclusion, related to their experience and values, as they determine which policies and practices they wish to promote or discourage.

Box 4.6. Using the Index for Inclusion

In a large urban secondary school in Portugal, a team of eight teachers, led by the principal, carried out surveys of staff, students and parents using the indicators from the Index for Inclusion. As a result of their findings, they recommended to their colleagues that efforts needed to be made to address what they saw as three inter-connected priority areas in order to make their school more inclusive. These areas were summarised as follows:

Priority 1: During lessons students are encouraged to work together

- Do lesson activities require students to collaborate?
- Do teachers ask students to discuss the content of lessons?
- Do teachers help students to learn the skills of working together?

Priority 2: Students support one another

- Do students talk to each other about their learning tasks?
- Do students feel that their classmates help them?
- Are any students ignored by other members of their class?

Priority 3: Staff development policies support teachers in responding to student diversity

- Are there meetings where teachers can share their ideas?
- Do teachers have opportunities to observe one another's practices?
- Do teachers feel that they are supported in dealing with difficulties?

Over a period of a year, the school used these indicators and questions as a framework for moving practice forward. This also provided a means of collecting more detailed evidence through mutual classroom observations, including group analysis of video recordings.

Source: Ainscow (2003[77]), *Using teacher development to foster inclusive classroom practices.*

An inclusive culture

International research that examines the effectiveness of school actions in promoting inclusion suggests that some schools are characterised by an "inclusive culture" (Dyson, Howes and Roberts, 2004[40]). Within these schools, there is a degree of consensus among adults around values of respect for difference and a commitment to offering all students access to learning opportunities.

The extent to which these inclusive cultures lead directly and unproblematically to enhanced student participation in school and classroom activities is not clear. Some aspects of these cultures, however, can be seen as participatory by definition. For instance, respect for diversity from teachers may be understood as a form of participation by students within a school community. Moreover, schools with these cultures are also likely to be characterised by forms of organisation (such as specialist support being made within the mainstream classroom, rather than by withdrawal for separate support) and practices (such as co-operative group work) which could be regarded as participatory by definition.

It is predictable that the introduction of significant changes in the ways those in schools work will lead to periods of organisational 'turbulence' (Hopkins, Ainscow and West, 1994[78]). The nature of this phenomenon will vary from place to place, but it generally arises as a result of the reactions of individuals to ideas and approaches that disrupt the status quo of their day-to-day lives. It is worth noting, however, that there is research evidence suggesting that without periods of turbulence, successful, long-lasting

change is unlikely to occur (Fullan, 2007[12]). In this sense, turbulence can be seen as a useful indication that the situation is changing. At the same time, this underlines the importance of skilled school-level leadership in creating the organisational conditions to support those involved as they face new challenges to their thinking and practices.

Implications for leadership practices

Particular forms of leadership are known to be effective in promoting inclusive practices (Riehl, 2000[41]; Ainscow and Sandill, 2010[79]). These approaches focus attention on teaching and learning; create strong communities of students, teachers and parents; nurture the understanding of a culture of inclusion among families; and foster multi-agency support. Unlike mechanistic views of educational improvement, these approaches acknowledge that decisions about how to improve schools always involve moral and political reasoning, as well as technical considerations. Therefore, having discussions about equity and inclusion can help to articulate the values that underlie which, how and why changes should be made in schools.

All of this means that attempts to develop inclusive schools should pay attention to the building of consensus around inclusive values within school communities. This implies that school leaders should be selected in the light of their commitment to inclusive values and their capacity to lead in a participatory manner (Riehl, 2000[41]). They will need professional learning opportunities that will support them in putting this stance into action. Once again, this should involve the active participation of practitioners to strengthen their practices (Box 4.7).

Box 4.7. Promoting ethical leadership

An action learning study carried out by Harris et al. (2017[80]) involved a network of schools in the state of Queensland, Australia. Together, these schools explored how ethical leadership could promote ways of interpreting and using various forms of evidence to enhance learning and equity.

School leaders in the schools engaged in action learning projects related to the promotion of equitable leadership. They valued this approach, which helped to generate a language of review and reflection on practice that supported the promotion of greater equity for all of their students. Specifically, this approach showed the importance of school leaders engaging with the varied views of students, teachers, communities, authorities and university researchers in ways that challenged existing practices and led to collaborations for more equitable learning outcomes.

School leaders in the network were seen as sources of mutual challenge and support, bringing their experiences and perspectives to the discussions taking place among one another. In this way, the action learning process experienced by the school leaders during network meetings became the process by which their own leadership practices were challenged and developed.

Source: Harris et al. (2017[80]), *Promoting equity in schools: collaboration, inquiry and ethical leadership.*

None of this provides a straightforward mechanism for the development of more inclusive practices. Bartolome (1994[81]) explains that any space for reflection that is created as a result of engaging with evidence may sometimes be filled by conflicting agendas. She argues that design, selection and use of particular teaching approaches arise from perceptions about learning and students. Therefore, even the most pedagogically advanced methods are likely to be ineffective in the hands of those who implicitly or explicitly subscribe to a belief system that regards some students, at best, as disadvantaged and in need of 'fixing', or at worst as deficient and therefore '"beyond fixing".

This means that the concern with the principles of equity and inclusion needs to focus not just on ways of working, but also on the thinking that is behind actions and the impact that this thinking has on practices.

This requires a concern with the attitudes and assumptions that influence what teachers do, some of which may be unconscious (Sadker et al., 2009[82]), as well as a reflection on how these can be modified through dialogues with others, especially with students themselves (Brussino, 2021[48]).

Resources for promoting inclusive practices

The approach to professional learning recommended here is radically different to traditional approaches based on attendance at courses and workshops, where participants are largely passive recipients of other people's ideas. Its introduction will therefore need careful planning at the national level and dynamic coordination of its implementation at the local level. It will also be important to involve practitioners as active participants in the process.

In taking this challenging agenda forward in Portugal it would be helpful to draw on the recently revised resource pack, *Reaching Out to All Learners*, developed by the UNESCO International Bureau of Education. Informed by international research evidence, these materials are intended to influence and support inclusive thinking and practices at all levels of an education system. Consequently, the materials are designed to be relevant to teachers, school leaders, district level administrators, teacher educators and national policy-makers (see Box 4.8).

Box 4.8. Reaching out to all learners

This resource pack of professional learning material targets the practicalities of addressing the challenge of promoting equity and inclusion in schools and other education centres, such as early childhood education and care, and further education provision.

More specifically, the resource pack focuses on three strategic questions: i) how can schools be developed in order to respond positively to student diversity?; ii) how can classroom practices be developed that will ensure that lessons are inclusive?; and iii) how can practitioners engage families, partner schools and the wider community in their efforts to become inclusive and equitable?

While the materials can be read and used by individuals, they were designed to encourage collaborative forms of professional learning in different settings. These are i) within individual or groups of schools to promote the development of policies and practices; ii) as part of in-service courses or workshops for teachers; iii) within collaborative action research projects involving schools working with the support of university staff; and iv) within pre-service teacher education courses (although some of the activities included in the resource pack will need to be revised in light of the limited experiences of participants).

Source: UNESCO/IBE (2016[83]), *Training Tools for Curriculum Development. Reaching Out to All Learners : a Resource Pack for Supporting Inclusive Education*, www.ibe.unesco.org/sites/default/files/resources/ibe-crp-inclusiveeducation-2016_eng.pdf (accessed on 18 November 2021).

In addition, UNESCO has published a range of professional learning materials intended to influence and support inclusive thinking and practices at all levels of the education system.[6]

Other relevant resources have been made available by the European Agency for Special Needs and Inclusive Education, such as those developed through the Raising the Achievement of All Learners in Inclusive Education project (Donnelly and Kefallinou, 2017[84]). These materials provide a synthesis of country information and findings from the project's practical work. They also discuss the particular challenges of promoting academic achievement amongst all students.

In addition, the European Agency has worked with UNESCO to produce a collection of case studies in order to support stakeholders (e.g. policy makers, teachers and educators, researchers, development partners, NGOs) in developing and implementing equitable and inclusive education policies, programmes and practices.[7]

Leadership development

The use of these forms of school-based professional learning materials demands organisational flexibility and the active support of senior staff who must be prepared to encourage and support processes of experimentation within their schools (Leithwood and Riehl, 2005[85]). Where this is focused on issues related to student diversity, it is likely to challenge the way of thinking of those within a particular organisation (Ainscow, 2007[86]). Therefore, leaders at all levels need to encourage the conditions within their organisations for challenging discriminatory, inequitable and non-inclusive educational practices. In particular, senior staff in schools need to build consensus and commitment towards putting the universal values of equity and inclusion into practice.

Crucial to all this is the development of forms of leadership that encourage an inquiring stance amongst school staff and a climate that supports a degree of risk taking. An approach to leadership development that may be relevant in Portugal is that of "action learning", a collaborative inquiry approach originally developed by Reg Revans, an English physicist (Bray et al., 2000[87]). This involves the creation of action learning "sets", i.e. groups of colleagues that work on solving real problems through repeated cycles of action and reflection (see Box 4.9). In this way, the action learning process encourages the sharing of expertise, while also offering challenges to existing leadership practices.

> ### Box 4.9. A leadership action learning process
>
> A partnership of head teachers in England (United Kingdom) focused on the issue of how leadership can influence student behaviour. Their work started from an assumption that the behaviour of students in schools should be understood in respect to their learning and the contexts in which learning is meant to take place. Based on this, the focus of their work was put on the nature of leadership practice and how it develops. The group of head teachers also assumed that the development of leadership practice starts from personal experience and involves forms of social learning, as those within a given workplace explore ways of solving the practical problems they face as they carry out their duties.
>
> During the first two years, a "think-tank" of ten head teachers (five from primary schools and five from secondary) interested in taking this agenda forward in their schools met termly to share ideas. Their discussions focused on the question: "What forms of leadership practice encourage behaviour that facilitates the learning of all students within a school?" During the second phase, four networks of schools (i.e. 26 schools in total) used the material produced by the think tank to review and develop their leadership practices. Heads and other senior staff from these schools formed local action learning groups, adopting a process similar to that used within the think tank. Each group was facilitated and supported by a head teacher from the original think-tank. At the same time, the participants were encouraged to use the materials to facilitate a similar review and development process with the leadership teams in their own schools.
>
> Source: Fox and Ainscow (2006[88]), *Moving leadership practice in schools forward*.

Formulate clear guidance on the use of support resources within schools and communities

Specialist resources

Within Portugal, there is an impressive range of additional professional and community support available that can be mobilised to support the development of inclusive practices, including the CRIs and the multidisciplinary teams set up to promote inclusive education for particular students. The review team was fortunate to meet representatives of many of these groups. What was striking was their commitment to current policies and their desire to put them into practice.

A particular strength is the existence of many specialist staff, there to support vulnerable students. However, the new thinking emphasised by Portuguese national policy will require significant changes in their thinking and practice. As explained above, progress towards a more inclusive education system requires a move away from practices based on the traditional perspectives of special education (see Box 4.10). In particular, it involves a shift away from explanations of educational difficulties that concentrate on the characteristics of individual students and their families, towards an analysis of the contextual barriers to participation and learning experienced by students. Within this formulation, efforts to promote inclusion are seen as a continuous process. An inclusive school is therefore one that is on the move, rather than one that has reached a perfect state (UNESCO, 2017[33]).

Box 4.10. Mobilising support

For more than 30 years, New Brunswick, Canada, has pioneered the concept of inclusive education through legislation, local authority policies and professional guidelines. More recently, New Brunswick adopted Policy 322 on Inclusive Education the first province-wide policy mandated by the Minister of Education.

The policy sets out the requirements to implement inclusive school environments where student-centred learning approaches are promoted for the inclusion of all students. The policy is a legally binding policy and has been used a model by other education systems, both in Canada and other regions of the world, to promote inclusive education for all students.

This policy defines the critical elements of an inclusive education system that supports students in common learning environments and provides supports for teachers. It sets clear requirements for school practice, including procedures for the development of personalised learning plans, inclusive graduation, as well as strict guidelines when a variation of the common learning environment may be required.

Source: Aucoin, Porter and Baker-Korotkov (2020[16]), "New Brunswick's journey to inclusive education", https://doi.org/10.1007/s11125-020-09508-8.

Collaborative problem solving

The new thinking that informs Portuguese educational policy provides those with a background in special education with new opportunities for representing the interests of those students who are marginalised within existing educational arrangements. For this to happen, however, there needs to be greater clarity about the roles of specialist support staff.

With this in mind, the roles of the multidisciplinary teams in each school needs refining in order that they can formulate and coordinate inclusive school improvement strategies. At present, the teams mainly work at the level of the cluster, where they seem to be an effective means of ensuring that support is allocated to individual students, as and when necessary. In order to support the development of inclusive classroom practices, however, they will need to involve planning that is much more closely linked to the day-to-day work of teachers. One possibility would be for sub-teams to be introduced that are focused on particular sections of a school.

In some countries, this approach takes the form of what are called "improvement boards", particularly in schools where student progress is a cause for concern (Ainscow, Chapman and Hadfield, 2020[18]). Meeting monthly and chaired by the school director, these boards involve a small group of key stakeholders who plan activities to move practices in their schools forward with pace (see Box 4.11). This process involves a new, more powerful form of accountability. This is unlike traditional top-down approaches, with their emphasis on reporting to external agencies. Instead, it involves a form of mutual accountability, where those involved share responsibility and hold one another accountable for making change happen.

Box 4.11. The Accelerated Improvement Boards in Wales (United Kingdom)

Government officials have been surprised by the impact of these boards, which are intended to coordinate and inject pace into school improvement efforts, focusing in particular on those students whose progress is a matter of concern. The power of the boards seems to be that they emphasise the importance of head teachers taking responsibility for improvement strategies, using a small number of key outsiders as sources of support and challenge.

The fact that the boards meet monthly ensures that pace is maintained and that those involved hold one another accountable for carrying out agreed tasks. The notes of the meetings provide an efficient means of keeping stakeholders informed in ways that avoid time-wasting reporting arrangements. It is encouraging that this strategy is now being introduced more widely across Wales.

Source: Ainscow, Chapman and Hadfield (2020[18]), Changing education systems: a research-based approach.

Relevant to this, Alves, Campos Pinto and Pinto (2020[5]) report that Decree Law No. 54/2018 was amended in September 2019, to give greater power to parents and caregivers, who are now recognised as "variable members of the multidisciplinary teams" (Law No. 116/2019, Art. 4a) and entitled to participate in the elaboration and evaluation of technical-pedagogical reports, in addition to the Individual Education Plans (IEPs) as the previous Decree Law already allowed. On the other hand, schools (through their multidisciplinary teams) are now required to define indicators to assess the efficacy of the measures implemented (Law No. 116/2019, Art. 5). Additionally, the Government took on the responsibility to develop the statistical indicators for evaluating its inclusive education policy (Law No. 116/2019, Art. 33.7).

Community resources

Moving beyond what happens within schools, there is a need to draw on the support of other actors in the wider community who have significant roles in the lives of children and young people. These include parents/caregivers; teacher educators and researchers; national, local and school-level administrators and managers; policy makers and service providers in other sectors (e.g. health, child protection and social services); civic groups in the community; and members of minority groups that are at risk of exclusion. The preoccupation with equity means that this also requires a particular concern to giving voice to those who may be powerless or unheard in the decision-making processes (Groundwater-Smith, 2011[89]).

Family involvement is crucial, particularly with vulnerable students. For example, data from PISA 2018 shows that, on average across OECD countries and in half of the education systems with available data, parents of low achieving students were more likely than parents of top-performing students to report that their child's school makes an effort to get them involved in school matters (OECD, 2020[7]). This disparity may be interpreted positively for some countries, given that some of these policies, such as providing education opportunities for parents, family-support programmes and information on how to help students with homework, may be targeted to struggling students. However, it is worth noting that Portugal is one of the countries with the largest gaps in the index of school policies for parental involvement.

In some countries, parents and education authorities cooperate closely in developing community-based programmes for certain groups of students, such as those who are excluded because of their gender, socio-economic status or physical impairments (Miles, 2002[90]). A logical next step is for parents and other family members to become involved in supporting change for promoting inclusive school environments. Relevant to the current context, there are international indications that the challenges brought about by the COVID-19 pandemic have encouraged greater cooperation between schools and families (see Box 4.12).[8]

> ### Box 4.12. Supporting the community in a time of crisis
>
> In England (United Kingdom), the Reach Academy Feltham is a school with 900 students aged between 2 and 18. It has been committed to inclusion since its inception. Forming strong relationships with both students and parents is therefore at the core of the school's culture. This usually involves regular contact with students' families and the COVID-19 response naturally included this.
>
> As the country went into lockdown, the staff began planning their response to the crisis. This led the school to take a lead in co-ordinating a multi-agency response across the local community. During the lockdown months, students continued their education online at home. At the primary level (ages 4-11) there was a 98% work completion rate, dropping slightly to 85% at the secondary level (ages 11-18). Senior staff put this down to the strong inclusive school culture and organisation-wide expectations.
>
> The obvious barrier was a lack of internet access at home or a computer amongst some of the families. In the cases where ICT-related issues at home prevailed, students were invited into school to complete their online work individually. Every family received at least one contact per week from their class teacher at the nursery and primary levels, or from a familiar member of the secondary staff further up the school. For the most vulnerable parents, this increased to a daily check-in phone call or home visit. The expectation that students must submit daily work created another point of contact between the school and the families. If a student failed to submit any work on a given day, this triggered a call to make sure that everything was okay and to offer further support if required.
>
> Source: Reach Academy Feltham (2021[91]), www.reachacademyfeltham.org (accessed on 18 November 2021).

Where parents lack the confidence and skills to participate in such developments, it might be necessary to engage and build capacity and networks. This could include the creation of parent support groups, training parents to work with their children, or building the advocacy skills of parents to negotiate with schools and authorities. Here, it is worth adding that there is evidence showing that the views of families, including children, can be helpful in bringing new thinking to the efforts of schools to develop more inclusive ways of working (Calderón-Almendros et al., 2020[11]).

Focusing on place

All of this involves strengthening the ways in which schools work with families and communities, and enriching what they offer to students. In this respect there are many encouraging examples of what can happen when school-level actions are aligned in a coherent strategy with the efforts of other local players – employers, community groups, universities and public services (Kerr, Dyson and Raffo, 2014[92]; Drever, McLean and Lowden, 2021[93]). This implies creating partnerships beyond the school, where partners multiply the impacts of each other's efforts (see Box 4.13).

This place-based approach draws on the principles underpinning the highly acclaimed Harlem Children's Zone in the United States (Whitehurst and M., 2010[94]). This involves efforts to improve outcomes for children and young people in an area of disadvantage through an approach characterised as being "doubly holistic". That is to say, the Harlem Children's Zone seeks to develop coordinated efforts to tackle the factors that create disadvantage for some students and enhance the factors which support them, across all aspects of their lives from 'cradle to career'. Dobbie and Fryer (2009[95]) describe the Children's Zone as "arguably the most ambitious social experiment to alleviate poverty of our time" (p. 1[95]).

> ### Box 4.13. Children's neighbourhoods Scotland (United Kingdom)
>
> In Scotland (United Kingdom), drawing lessons learnt from initiatives nationally and internationally, Children's Neighbourhoods Scotland has developed a model of community- and place-based working tailored to particular contexts.
>
> Working in urban, small town and rural communities enables the project to explore the transferability, sensitivity, and suitability of the approach in different geographical and socio-economic contexts and to make a contribution to the evidence base and literature on place-based approaches in practice.
>
> The programme is coordinated, supported and evaluated by a team of researchers from the University of Glasgow. Early on it was decided not to restrict the age of children and young people that might be involved, and to have geographical site boundaries that were fluid in nature. This allows the programme to be as inclusive as possible, promoting engagement and participation across age groups, while maintaining a focus on the areas the project is working in.
>
> Source: Children's Neighbourhoods Scotland (n.d.[96]), "Our Approach", https://childrensneighbourhoods.scot/our-approach/ (accessed on 19 November 2021).

The role of researchers

Consideration should also be given to the role of researchers in support of the development of inclusive practices and leadership (see Box 4.14). Portugal has a well-established tradition of using researchers' expertise to monitor and evaluate the impact of policy changes. However, experiences in other countries have shown how researchers can also take a more active role in working alongside practitioners in developing and trialling new ways of including hard-to-reach students (Ainscow, Chapman and Hadfield, 2020[18]). The review team heard encouraging reports of new initiatives based on this perspective that are currently being planned.

Relevant to these developments, Hiebert, Gallimore and Stigler (2002[64]) suggest that fruitful forms of collaboration between practitioners and researchers require a reorientation of values and goals amongst both groups. Therefore, they argue that teachers need to move away from the dominant view that teaching is a "personal and private activity". Rather, teachers have to adopt the "more risky view" that it is an activity that can be continuously improved, provided it is made public and examined openly. At the same time, they argue that researchers must stop undervaluing the knowledge teachers acquire in their own classrooms.

> ### Box 4.14. Teachers and researchers learning together
>
> In England (United Kingdom), a network of primary schools has worked in partnership with a local university education department to bring teachers and researchers together. The schools followed a model of collaborative inquiry that draws on teachers' professional expertise and wider research knowledge, to explore new ways of supporting students from socio-economically disadvantaged backgrounds. Overall, the aim is to improve the learning opportunities, experiences and outcomes of all students, and particularly those experiencing barriers to learning.
>
> Each school determines its research focus, starting by identifying issues that are causing concern or that are puzzling in some way. Schools then follow a structured research programme where teachers and university researchers collect and share evidence on the school's practices so that they can develop a rich and deep understanding of what is happening to students in school, and from wider research. This evidence is then used to stimulate new thinking and professional learning on current practices, and to identify strategies for responding to the research findings.
>
> The schools have used exchange visits to generate evidence regarding their shared focus on developing more inclusive practices. The aim of these visits is to look specifically at relative strengths and weaknesses within schools in the network, using differences to stimulate new thinking. University researchers support these processes, using their specialist expertise to raise questions and help teachers collect and engage with relevant evidence.
>
> Source: Ainscow et al. (2016[97]), *Using collaborative inquiry to foster equity within school systems: opportunities and barriers*.

Ensure that there is a coordinated structure of local support to schools and school clusters in promoting equity and inclusion

Local structures

The team heard occasional reference to the existence of regional teams, although these were little or not referred to by those in the field (for more details on regional teams, see Chapter 1). The review team also heard accounts of how some municipalities have introduced projects that promote local collaboration to address the challenges experienced by some groups of students.

In general, there still seems to be considerable uncertainty within Portugal regarding the status and roles of the various local structures that exist. In particular, the role of regional teams (e.g. Curriculum Autonomy and Flexibility teams) might be often unknown and the respective contributions of municipalities and parishes appears to vary across the country. It is therefore encouraging that new arrangements are currently being introduced to transfer various powers to municipalities regarding the management of infrastructure and facilities, human resources, social support and curricular enrichment activities more adapted to local circumstances. At the same time, as explained below, the focus should be on strengthening local networks that will encourage mutual support between clusters, building on examples of effective practice (see Box 4.15, which provides an example of an effective collaboration in Portugal).

Box 4.15. A locally coordinated partnership

Schools in one cluster in the Faro area illustrate the potential that exists within Portuguese schools. The cluster took part in a project that involved the use of collaborative action research. An important feature of the initiative was the role taken by senior staff within the cluster in co-ordinating and supporting its development, with support from the municipality.

The broader study was funded by the European Union between 2017 and 2020 and involved 30 primary schools in five European countries, namely Austria, Denmark, England (United Kingdom), Portugal and Spain. It involved teachers and students participating actively as research partners alongside colleagues from universities, with the aim of improving classroom practices.

More specifically, the study involved the use of inclusive inquiry, an approach that involves trios of teachers cooperating with their students to find ways of making their lessons inclusive. This approach involves three phases, all of which require dialogue between students and teachers. Most importantly, inclusive inquiry involves some students in learning how to use research methods to gather the views of their classmates. The dialogues that this encourages are focused on improvements in learning and teaching. This means that differences amongst students and teachers are used to reconsider existing thinking and practices in ways that are intended to encourage experimentation to foster more inclusive ways of working. This, in turn, sets out to break down barriers that are limiting the engagement of some students.

Source: Vitorino and Santos (2020[98]), "Pesquisa Inclusiva: diálogo alunos-professores como fator de promoção da educação inclusiva" [Inclusive Research: student-teacher dialogue as a factor to promote inclusive education], https://doi.org/10.34632/investigacaoeducacional.2020.9684.

International research supports such moves to strengthen local coordination. For example, having analysed "how the world's most improved school systems keep getting better", the authors of a McKinsey report express their surprise at the critical role that what they call the "mediating layer" plays between school delivery and central government (Mourshed, Chijioke and Barber, 2010[99]). This led the authors of the report to conclude that in the longer-term sustaining system improvement requires "integration and intermediation" across each level of the system, "from the classroom to the superintendent or minister's office". They explain:

"The operating system of the mediating layer acts as the integrator and mediator between the classrooms and the centre. This is not to suggest that school reforms should begin here. In every system we looked at, the first focus of school reforms was on the schools and the centre. Efforts to strengthen the mediating layer usually came later, as the need for an active intermediary in delivering the system improvements became clearer" (p. 82[99]).

The authors of the report also suggest specific functions that local coordination arrangements should play, which are particularly relevant in Portugal. This does not imply the introduction of a new layer of formal governance at the local level. Rather, it would involve intermediate structures providing targeted support to schools; acting as a buffer between the centre and the schools while interpreting and communicating the improvement objectives to manage any resistance to change; and enhancing the collaborative exchange between schools, by facilitating the sharing of good practices, helping them to support each other and share learning.

In the Portuguese context, this form of local coordination could be achieved through the strengthening of regional teams and the involvement of cluster and school leaders in creating local networks of mutual support. Municipality staff would have a key role in facilitating these support networks. In addition, inspectors could monitor their impact and connect innovative developments across the country in order to encourage further sharing of effective ways of working.

Co-ordinating local partnerships

A recent report noted that four of the most successful national education systems – Singapore, Estonia, Finland, and Ontario, Canada – have what is referred to as a coherent "middle tier", regardless of their differing extents of school autonomy or devolution of decision-making (Bubb et al., 2019[100]). In particular, all these systems have district-level structures that offer a consistent view according to which, to maintain equity and excellence, there needs to be an authoritative local co-ordinating influence. In the case of Portugal, due to its governance system and the limited autonomy given to municipality in the area of education, such structures could not have an authoritative power on pedagogical matters. Rather, they would act as proximity support bodies. Such bodies should (1) support schools in the implementation of inclusive education; (2) fill the gap between schools and the central authorities that manages them; and (3) be involved in accountability strategies. Regional teams and the Inspectorate (*Inspeção-Geral da Educação e Ciência*, IGEC) can be such structures.

The argument that local coordination is particularly crucial for efforts to promote equity and inclusion is supported by various other international experiences (UNESCO, 2017[33]). In regards to this agenda, once again, context matters. That is to say, those who are nearest to the field need to be empowered to access their local circumstances in order to identify barriers that are experienced by some students and, in so doing, mobilise human resources to address these difficulties.

Box 4.16. City Challenge in England (United Kingdom)

The City Challenge was introduced as an improvement strategy in three city regions in England (United Kingdom) between 2008 and 2011, following an earlier successful initiative in London.

A detailed analysis of the local contexts led to the conclusion that plenty of good practice existed across schools in the areas. Consequently, it was decided that collaboration and networking between schools would be key strategies for strengthening the overall capacity of the system to reach out to vulnerable groups of students. More specifically this involved a series of inter-connected activities for "moving knowledge around" to build a self-improving school system.

With this in mind, "Families of Schools" were set up. This approach partnered schools that serve similar populations while, at the same time, encouraging partnerships amongst schools that were not in direct competition with one another because they did not serve the same neighbourhoods. Led by head teachers, the Families of Schools strategy proved to be successful in strengthening collaborative processes within the city regions in ways that improved outcomes for students from socio-economically disadvantaged backgrounds. In this way, expertise that was previously trapped in particular contexts became more widely available.

Source: *Hutchings et al.* (2012[101]), *Research report DFE-RR215: Evaluation of the City Challenge programme,* https://www.gov.uk/government/publications/evaluation-of-the-city-challenge-programme *(accessed on 18 November 2021).*

A particular set of important factors that require local coordination relate to how local schools engage with one another (see the example in Box 4.16). As noted above, there is considerable evidence that school-to-school collaboration can strengthen improvement processes by adding to the range of expertise made available. In particular, this research indicates that collaboration between schools has an enormous potential for fostering the capacity of education systems to respond to student diversity.

There is also evidence showing that when groups of schools seek to develop more collaborative ways of working, this can have an impact on how teachers perceive themselves and their work (Rozenholtz, 1989[102]). However, research suggests that certain conditions are necessary to make school-to-school collaboration effective (Chapman and Ainscow, 2021[103]). These are:

- The development of positive relationships amongst groups of schools, in some instances across the borders of local authorities.

- The presence of incentives that encourage key stakeholders to explore the possibility that collaboration will be in their own interests.

- Senior staff in schools who are willing and skilled enough to drive collaboration forward towards collective responsibility, while coping with the inevitable uncertainties and turbulence.

- The creation of common improvement agendas that are seen to be relevant to a wide range of stakeholders; and

- Coherent external support provided by credible consultants/advisers (from the local authority or elsewhere) who have the confidence to learn alongside their school-based partners, exploring and developing new roles and relationships where necessary.

The role of municipality support staff

There are important implications in all of this for the future roles of the support staff employed by municipalities. As local partnerships strengthen, they should adjust their ways of working in response to the development of improvement strategies led from within school clusters. To be able to better support school clusters and individual schools, municipalities could be given additional responsibilities within the decentralisation process. Specifically, in synergy with regional teams (e.g. for curricular autonomy and flexibility and TEIP teams), they should monitor and challenge schools in relation to the agreed goals of collaborative activities, while senior staff within clusters share responsibility for the overall leadership of improvement efforts. In taking on such roles, municipality support staff can position themselves as guardians of improved outcomes for all students and their families - protectors of a collegiate approach but not as managers of day-to-day activities.

Having analysed two relatively successful large-scale improvement initiatives, Hargreaves and Ainscow (2015[104]) argue that, in taking on these new roles, district-level (which, in the case of Portugal, would be municipal-level) staff can provide a valuable focus for school improvement. They can also be a means for efficient and effective use of research evidence and data analysis across schools, support schools in responding coherently to multiple external reform demands, and be champions for students and families, making sure everybody is treated equitably.

The problem is that not all municipalities are socio-economically equal and give the same priority to education. Therefore, a way to reduce variation amongst school districts is to promote collaboration among them so they share resources, ideas and expertise, and exercise collective responsibility for student success. In adopting this "leading from the middle" approach, municipalities can become the collective drivers of change and improvement by strengthening social capital in their area. They can contribute to better synergies between the different levels of the education system and promote bottom-up initiatives rather than exclusively top-down approach. In facilitating such developments, it can be helpful to adopt a shared framework, such as the one provided by the "ecology of equity" (Ainscow et al., 2012[26]) (see Box 4.17).

> ### Box 4.17. An ecology of equity
>
> Creating local area partnerships can be facilitated by the use of guiding frameworks. This one emerged from research carried out in England (United Kingdom) that led to the creation of a framework for reviewing school districts known as the "ecology of equity". This framework is based on the assumption that the extent to which students' experiences and outcomes are equitable is not dependent only on the educational practices of their teachers, or even their schools. Instead, it depends on a whole range of interacting processes that reach into the school from outside. These processes include the demographics of the areas served by schools, the histories and cultures of the populations who send (or fail to send) their children to the school, and the socio-economic realities faced by those populations.
>
> Beyond this, they involve the underlying socio-economic processes that make some areas poor and others affluent, and that draw migrant groups into some places rather than others. These processes are also influenced by the wider politics of the teaching profession, of decision-making at the district level, and of national policy-making, as well as the impacts of schools on one another over issues such as exclusion and parental choice.
>
> In addition, these interactive processes reflect models of school governance, the ways in which local school hierarchies are established and maintained, and the ways in which school actions are constrained and enabled by their positions in those hierarchies. Taking this perspective, it is clear that there is much that individual schools can do to tackle issues within their organisations, and that such actions are likely to have a profound impact on student experiences, perhaps also influencing inequities arising elsewhere. However, it is equally clear that these strategies do not lead to schools tackling issues between- and beyond-schools directly. No school strategy can, for example, make a socio-economically disadvantaged area more affluent or increase the resources available to students' families any more than it could create a stable student population, or tackle the global processes underlying migration patterns.
>
> Source: Ainscow et al. (2012[26]), *Developing equitable education systems*.

Strengthen strategies for monitoring and evaluating inclusive education practices at the local and school levels

Using data for strategic planning

In order to develop a strategy for co-ordinating developments at a local area level, it will be important to carry out a contextual analysis in order to identity challenges that need to be addressed and good practices that can be built on in order to address these difficulties. As discussed with various policy makers during the review meetings, there is a major challenge for Portugal regarding the collection and use of statistical data to assess progress in relation to inclusive developments in schools and across local areas, not least because of the commendable commitment to avoid the risks associated with categorising students. This means that deciding the kind of evidence to collect and how to use it requires care, since, within education systems, "what gets measured gets done" (Ainscow, 2005[105]).

This is widely recognised as a double-edged sword precisely because it is a potent lever for change. On the one hand, data are required to monitor the progress of students, evaluate the impact of interventions, review the effectiveness of policies and processes, plan new initiatives, and so on. On the other hand, if effectiveness is evaluated on the basis of narrow, even inappropriate, performance indicators, then the impact can be deeply damaging. While appearing to promote the causes of accountability and

transparency, the use of data in practice can conceal more than they reveal, invite misinterpretation, and have a perverse effect on the behaviour of professionals. Therefore, the challenge is to harness the potential of evidence as a lever for change, while avoiding these potential problems (see Box 4.18).

The starting point for making decisions about the evidence to collect at the local area level should be with agreed definitions of equity and inclusion. In other words, the aim must be to "measure what we value", rather than, as it is often the case, "valuing what we can measure".

Box 4.18. Assessing progress in New Zealand

In New Zealand, the Government concluded that a key reason for the country's low equity and achievement outcomes was that schools had predominantly operated as autonomous, self-managing entities, loosely connected to each other, and with a distant relationship with the centre. The government argued that this autonomy had left schools to operate largely on their own and without sufficient support.

A taskforce set up to address this issue concluded that that the system faced significant and persistent challenges in delivering equitably for all children and young people, especially those who are Māori, Pacific, have special education needs, or come from disadvantaged socio-economic backgrounds.

The taskforce recommended changes to strengthen the capability of schools to undertake self-evaluation and continuous improvement, including ensuring effective engagement with communities. The taskforce committed to ensure that progress towards making these changes is considered within the broader context of improvements being made across the whole education system.

Based on this recommendation, the Ministry of Education has been developing advice on how this monitoring and reporting can be best delivered in a timely, coherent, and effective manner over the next five to ten years. The Ministry aims to ensure that their research and evaluation functions provide a strong basis for generating effective system level information and evaluation that informs prioritisation, action, and improvement. It is also argued that there is a potential for greater connectedness to make use of information and data to reduce the workload of schools in the context of monitoring and evaluation.

Source: Ministry of Education (2019[106]), *Supporting all schools to succeed.*

Developing an analytical review framework

A useful framework in relation to the use of data at the local area level is provided by the UNESCO Guide for Ensuring Inclusion and Equity in Education (UNESCO, 2017[33]). This Guide is intended to help countries review how well equity and inclusion currently figure in existing policies, decide what actions need to be taken to improve policies, and monitor progress as actions are taken. A self-assessment system is presented to accompany countries in this review exercise based on four key dimensions: concepts, policy statements, structures and systems, and practices.

Drawing on international research and on good practice related to equity and inclusion in education systems, the UNESCO Guide was developed with the advice and support of a group of international experts, including policy makers, practitioners, researchers, teacher educators, curriculum developers and representatives of various international agencies. The examples presented in the Guide allow countries to learn from the progress made in other regions of the world towards more inclusive and equitable education systems. It does this in relation to the following definitions which have proved to be valuable in a range of countries, no least in that they avoid the use of jargon:

Equity is about ensuring that there is a concern with fairness, such that the education of all students is seen having equal importance.

Inclusion is a process that helps overcome barriers limiting the presence, participation and achievement of students.

The use of these definitions suggests that evidence is needed in relation to the "presence, participation and achievement" of all students. At the same time, there is a moral duty to pay attention to those groups of students considered to be at risk of underachievement, marginalisation or exclusion, while taking care to ensure that no student is overlooked.

Generating data

In order to prevent a local area monitoring process from disadvantaging some students, it is suggested that statistical data could be generated using a sampling system, within which the identities of particular students and schools are not made public. District patterns within these data could then be shared with senior local representatives to inform their strategic planning.

Qualitative data on contextual factors are also needed, including information about the availability and use of resources and facilities, as well as on attitudes, beliefs, and social relationships. With the growing technological capacity to handle large amounts of different types of data, it is increasingly possible to generate information about the many influences that affect the inclusion, segregation, and exclusion of students within education systems. Focusing on these factors can help create the conditions for promoting equity and inclusion. As noted earlier in this chapter, the voices of students and families can be a powerful form of evidence when thinking about what barriers they face and how these might be overcome (see Box 4.19).

Box 4.19. Listening to children: Experiences in Denmark

In Denmark, the '"Children's Voice" project in Copenhagen's inner-city schools consults with parents and children to elicit their views on child's well-being and learning. The project aims to create more family-oriented actions in early childhood education and care, with everyone contributing as equal stakeholders.

The consultations are organised by professionals who create a framework for reflection in a "blame-free" atmosphere, where everybody is entitled to offer solutions to concerns that have been shared. This means that the meetings need to be well prepared, well facilitated and solution-focused. The consultation result in an action plan that the participants develop implement and evaluate jointly. Children's Voice seek to develop a unifying sense of community, grounded in individual realities, that aims particularly at building relationships.

Source: Lentz (2015[107]), "Inddragelse af 'Barnets Stemme' og udvikling af netværksmøder og læringsfællesskaber" [Involving 'Children's Voice' and developing network meetings and learning communities].

Inclusive laws and policies can be helpful in encouraging students' participation and, more broadly, the involvement of children and young people, in educational policy-making and the design of school projects (see Box 4.20). Participation of students is a fundamental right, which is embedded in international human rights treaties. In addition, strengthening the right to participation can substantially enhance children and adolescent's personal development, sense of belonging and self-worth as well as respect for others (Lansdown, Jimerson and Shahroozi, 2014[108]).

Box 4.20. The participation of children and young people in Portugal

Promoting the right to participation of children and young people has been an increasing concern in Portugal. Over time, the MoE has promoted initiatives to strengthen the participation of students in educational policy.

For example, in 2016, the MoE launched a broad discussion gathering teachers, students and parents to allow the participation of all stakeholders in the curriculum redesign process. During this process, students had the opportunity to express their views on the school and contribute with proposals in a public conference held in November 2016.

The MoE also participated in a Global Forum organised by the OECD Future of Education and Skills, 2030. As a result, a group of students became involved in the Students' Agency, within Education 2030, to participate in planning for their own education and future. This kind of seminar has since been replicated at the national level, across the country, by creating a national network involving various students, the MoE and other stakeholders.

Source: Ministry of Education (2022[3]), *OECD Review for Inclusive Education: Country Background Report for Portugal*.

Accountability and inspection

A movement towards greater responsibility for promoting equity and inclusion to the cluster and municipality levels has important implications for national accountability and inspection systems. Put simply, there has to be effective systems in place to ensure that local actions are being taken and that they are in line with national requirements.

Relevant to this concern, UNESCO's 2017/2018 Global Education Monitoring Report highlighted the responsibility of governments to provide universal quality education and stresses that accountability is indispensable in achieving this goal. The report also warned that disproportionate blame for systemic educational problems on any actor can have serious negative side effects, widening inequality and damaging learning (UNESCO, 2017[109]).

No approach to accountability will be successful without a strong enabling environment that provides actors with adequate resources, capacity, motivation and information to fulfil their responsibilities. With this in mind, the Global Education Monitoring Report calls on governments to (UNESCO, 2017[109]):

- Design accountability arrangements for schools and teachers that is supportive and avoid punitive mechanisms, especially those based on narrow performance measures.
- Allow for democratic participation, respect media freedom to scrutinise education and set up independent institutions to handle complaints.
- Develop credible and efficient regulations with associated sanctions for all education providers, public and private, that ensure non-discrimination and the quality of education.
- Make the right to education justiciable, which is not the case in 45% of countries in the world.

In terms of the current situation in Portugal, the review team heard few references to the influence of current arrangements for inspecting schools, although this may be partly due to the impact of the pandemic. Relevant to this, a recent study of inspection procedures in six countries (i.e. Austria, the Czech Republic, England (United Kingdom), Ireland, the Netherlands and Sweden), indicated the existence of varied practices across Europe (Ehren et al., 2017[110]). These variations ranged from using a low stakes approach involving inspecting schools on a regular basis without sanctions or rewards (e.g. Austria and Ireland), to school inspectorates utilising directive and focused, medium/high stakes early

warning analysis and customised inspections (e.g., the Netherlands, England (United Kingdom)). They also ranged from a centralised to a decentralised level of operation. Ehren et al. (2017[110]) study suggests that the impact of school inspections on the quality of education requires the setting of expectations, standards and norms, with self-evaluation and encouragement of capacity building and better teaching and learning as mediating mechanisms.

This points to the importance of Portuguese schools being actively involved in forms of self-evaluation, as required by national policy. During the school visits, however, only one example of this was noted. Again, this aspect could be the focus of some sharing of good practice between schools.

In this context, the research mentioned above on the benefits of school-to-school cooperation suggests that school evaluation should be carried out by "schools for schools" using forms of peer review as a stimulus for improvement (see Box 4.21). This echoes the recommendations of Fullan, Rincon-Gallardo and Hargreaves (2015[111]), who argue for a shift from a heavy reliance on external accountability towards an investment in the professional capital of teachers and school leaders. However, this shift must be challenging and credible. In other words, it should not involve forms of collusion within which partner schools endorse one another in an acceptance of mediocrity.

This concern could be addressed by involving school inspectors as moderators of the process. In this way, and as mentioned in Chapter 2, the inspection of schools in Portugal will play a key role in promoting the equity and inclusion agenda. This could be achieved through thematic inspections using samples of schools, reviewing the implementation of inclusive education practices in schools, and providing advice for the improvement of inclusive practices in schools, based on examples from different parts of the country.

Box 4.21. A peer review process in Wales (United Kingdom)

This enquiry-based process involves trios of schools in supporting each other's improvements. It consists of four stages:

Pre-enquiry. The host head teacher sends a data pack to the lead enquirer two weeks before the enquiry visit with potential lines of enquiry. The lead enquirer spends half a day considering the data and opening up possible lines of enquiry.

The enquiry visit. The enquiry team, made up of a small group of senior staff from the two partner schools visits the host school over two days. During these days:

- The lead enquirer meets the team and briefs them regarding data and lines of enquiry.
- The enquiry team meets host senior staff to discuss the lines of enquiry.
- The team engages in lesson observations, learning walks and interviews with stakeholders, including students take pace.
- During day two the team engages in: (1) further enquiry – work scrutiny, deeper observational focus on key areas, more interviews; and (2) a meeting to reflect on evidence gathered – agreement about lines of enquiry; A final meeting to offer feedback and discuss likely lines of enquiry.

Post visit.

- The lead enquirer writes the report.
- The lead enquirer creates an informal opportunity for the host head teacher to see a draft report and discuss the action plan.
- The report is formally provided to the host school within 10 working days of peer review.

Follow-up enquiry. When a school has hosted an enquiry, it may then commission a follow-up enquiry in the following year to look at its progress and impact in relation to the key lines of enquiry.

Source: Ainscow, Chapman and Hadfield (2020[18]), Changing education systems: a research-based approach.

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Notes

[1] See Decree Law No. 54/2018 (English): https://www.dge.mec.pt/sites/default/files/EEspecial/dl_54_2018_en_version_0.pdf (accessed on 09 November 2021).

[2] See list of the of accredited CRIs of the Directorate-General for Education (*Direção-Geral da Educação*, DGE): https://www.dge.mec.pt/sites/default/files/EEspecial/rede_nacional_de_centros_de_recursos_para_a_inclusaocri.pdf (accessed on 18 November 2021).

[3] The CRTICs were created in 2007 and became service providers of the Ministry of Education in 2015 (Dispatch No. 5291/2015). There are 25 CRTICs across the country (7 in the North, 6 in the Centre, 7 in the Lisbon and Tagus region, 4 in Alentejo and 1 in the Algarve). Among other elements, CRTICs are in charge of providing equipment to schools to support the learning of students with SEN and collaborate with training entities in the design of professional learning activities. See the 2015 Functioning Guide of the CRTICs for Special Education (in Portuguese):

https://www.dge.mec.pt/sites/default/files/EEspecial/guia_funcionamento_crtic_revisao_2018.pdf (accessed on 18 November 2021).
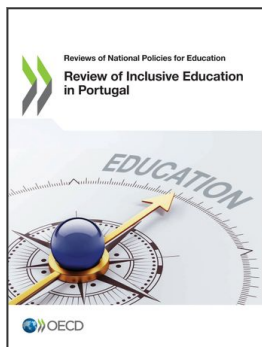
[4] See: https://link.springer.com/journal/11125/volumes-and-issues/49-3 (accessed on 09 November 2021).

[5] See: https://link.springer.com/journal/11125/volumes-and-issues/49-3 (accessed on 09 November 2021).

[6] See: https://en.unesco.org/themes/inclusion-in-education/resources (accessed on 18 November 2021).

[7] See: https://inclusive-education-in-action.org/ (accessed on 09 November 2021).

[8] See: https://en.unesco.org/covid19/educationresponse (accessed on 09 November 2021).