



# Does External School Evaluation Promote Inclusion? Leadership Voices from a Case Study

Jennifer Silva\*, Alexandre Ventura, and Diana Oliveira

University of Aveiro, Aveiro, Portugal

## Abstract

This study analyses how the principles of inclusive education are operationalised within a school cluster in Portugal and the extent to which the External Evaluation of Schools Programme (PAEE), conducted by the Inspectorate-General of Education and Science (IGEC), contributes to this process. A qualitative approach is adopted, combining analysis of the school organisation's key documents and the IGEC report with semi-structured interviews with the headteacher and the coordinator of the self-evaluation team. Thematic analysis, supported by MAXQDA software, is organised into two strands: i) leadership and management of resources for inclusion; and ii) the PAEE's contribution to educational practice and organisational improvement. In the school cluster studied, the findings indicate partial incorporation of the areas for improvement identified by IGEC, both organisationally and pedagogically. Despite alignment with the Headteacher's Intervention Project and the Strategic Action Plan, limitations persist that affect implementation, such as insufficient resources, teacher turnover, and measures rendered unfeasible by the absence of allocated timetabled hours, which limit the dissemination and consolidation of inclusive practices. The study concludes that the PAEE acts as a catalyst; however, sustaining its impact requires regular monitoring, effective internal coordination, and the proportionate allocation of appropriate resources, underpinned by committed leadership and teachers who translate the principles of inclusive education into effective, everyday pedagogical practice.

**Keywords:** school evaluation, school inspection, inclusive practices, school leadership, Portugal

## 1 Introduction

In recent years, inclusive education has become established as a structuring principle of international and national education policies, enshrining the right of all children and young people to access learning and quality education (Ainscow & Chapman, 2025; Alves et al., 2020). In Portugal, the commitment to inclusion is expressed in legislation and guidelines, namely in Decree-Law (DL) no. 54/2018 (Portugal, 2018, A), in DL no. 55/2018 (Portugal, 2018, B), and in the Students' Profile at the End of Compulsory Schooling, approved by Order no. 6478/2017 (Portugal, 2017). Together, these form a guiding framework that calls on schools to promote equity and participation and to value diversity – understood as capital

comprising experiences, knowledge, and identities – as a driver of pedagogical innovation, thereby expanding opportunities for success.

At the conceptual level, inclusion requires the system to adapt to diversity, not the other way round (UNESCO, 2020). In schools, inclusion is expressed in the mobilisation of support measures for learning and inclusion set out in DL no. 54/2018 (Portugal, 2018, A), the adoption of Universal Design for Learning, pedagogical differentiation practices, and collaborative work with specialist staff, families, and the community (DGE, 2018; Murawski & Scott, 2019).

At the same time, greater autonomy has been granted to schools at the curricular and organisational levels, accompanied by requirements for monitoring students' learning and progress (Afonso, 2010; Palmeirão & Alves, 2017). In this context, school leaders – senior and middle – play a crucial role in mediating between policy and practice: they define and clarify the organisation's vision, mobilise resources, create conditions for professional development, and consolidate collaborative cultures oriented towards success for all (Lourenço-Gil et al., 2020; Lopes & Oliveira, 2021).

The External Evaluation of Schools Programme (PAEE), conducted by the Inspectorate-General of Education and Science (IGEC), serves as an instrument for regulation and organisational improvement by identifying strengths and areas for improvement, which help inform priorities and decision-making in each school. It simultaneously functions as a mechanism of public scrutiny and fosters cultures of reflection and institutional learning. In the third cycle of the PAEE, its Reference Framework includes domains and indicators that engage directly with inclusion policies, emphasising the success and learning of all children and young people, as well as improvement-oriented management (IGEC, 2023; Fialho et al., 2020). However, the effects of external evaluation on pedagogical and organisational change depend, to a large extent, on how school leaders in each school or school cluster interpret and enact it (Silva et al., 2025).

Despite this framework, how and to what extent the PAEE influences inclusion-oriented pedagogical and organisational improvements, as well as the role that school leaders play in this process, remain poorly understood.

In this context, the research question guiding this study is: “In what ways are the principles of inclusive education implemented in a school cluster in Portugal, and how does the PAEE contribute to that implementation, according to the perceptions of the headteacher and the coordinator of the self-evaluation team?” The objectives are: i) to ascertain the perceptions of the headteacher and the coordinator of the self-evaluation team regarding the challenges and strategies adopted in implementing the principles of inclusion; ii) to analyse the role of the PAEE in promoting educational practices aligned with those principles and in organisational improvement; and iii) to identify the contribution of leadership to mobilising resources and managing the organisation to sustain inclusive pedagogical practices.

By combining documentary analysis with interviews with the headteacher and the coordinator of the self-evaluation team of a school cluster in mainland Portugal, the study provides empirical evidence on the relationship between the PAEE, leadership, and inclusion in Portugal. It also supports the discussion of the PAEE's potential as a catalyst for improvement, emphasizing the need for follow-up, ongoing professional development for teachers, and monitoring that aligns with normative principles and the practices actually implemented in schools.

## **2 Methods**

This study adopts a qualitative, interpretative approach (Braun & Clarke, 2013) and takes the form of a single-case study (Gerring, 2016), conducted in a school cluster in mainland Portugal. Case selection rests on two criteria: i) theoretical relevance, evidenced by the centrality of inclusive education in institutional documents, namely the School Educational Project and the Internal Regulations; and ii) the opportunity arising from the external evaluation carried out by IGEC as part of the third cycle of the PAEE, which makes it possible to examine the sequence linking the areas for improvement identified by IGEC, the actions undertaken in the cluster, and their monitoring. Likewise, access to school leaders receptive to participating in the study, along with the provision of institutional documents, enabled source triangulation and added analytical and descriptive rigour to the study.

### **2.1 Characterisation of the School Cluster**

In the Portuguese education system, a school cluster is an organisational unit with its own administrative and management bodies that brings together several educational establishments under a single leadership and with shared instruments for planning, monitoring and self-evaluation – article 6 of DL no. 75/2008 of 22 April (Portugal, 2008), as republished by DL no. 137/2012 of 2 July (Portugal, 2012). The case studied is a public, vertical school cluster located in a Portuguese town, offering educational services from pre-school to the 12th year and comprising 18 establishments (pre-schools, first-cycle basic schools, second- and third-cycle basic schools, and a secondary school).

In the 2024/2025 academic year, the cluster enrolled around 2,500 students, approximately 600 of whom were foreign nationals. A large proportion of students benefited from school social action support – for meals, transport, and school materials — and specialised support was provided by therapists and special education teachers to students covered by measures to support learning and inclusion (under DL no. 54/2018). The teaching staff comprised about 240 teachers; the non-teaching staff included administrative and operational assistants distributed across the 18 schools. The cluster also had linguistic and cultural mentors (two full-time and one part-time) and two psychologists (one full-time and one part-time). The structures set out in the institutional documents were in operation, namely the Learning Support Centre, the school libraries, and the resource centres, working in articulation with the teaching teams. Organisationally, the school year was structured in semesters; in infrastructural terms, the cluster's main school had not been refurbished under “Parque Escolar” (the public programme for the renovation of school buildings), and the headteacher noted urgent needs for intervention and improvement.

### **2.2 Participants**

The participants – two leaders of the school cluster, the headteacher and the coordinator of the self-evaluation team - were selected through purposive sampling. This choice is justified by their direct involvement in interpreting the areas for improvement identified by IGEC and in the subsequent planning and monitoring. Both were available and willing to take part in face-to-face interviews.

This study forms part of a wider doctoral project that includes other interviewee profiles (middle leaders). However, only these interviews are analysed here, as they are considered central to the stages of the improvement cycle: i) interpretation – analysis of the areas for improvement and framing of their implications for the school cluster; ii) implementation – setting priorities, planning actions, allocating resources, and overseeing implementation; and

iii) monitoring – collecting and analysing evidence, collecting and updating indicators, and feeding back to the teaching teams.

Regarding participants' profiles, the headteacher is a Physical Education teacher (third cycle of basic education and secondary level), with over 20 years of service, and is aged between 41 and 50. The coordinator of the self-evaluation team is a first-cycle basic education teacher with over 35 years of service and over 60 years old. As for academic qualifications, both hold a bachelor's degree, and the headteacher also has a postgraduate diploma in School Organisation and Administration. The coordinator reports having no specific training for the position and states that he is unaware of any training provision suited to his duties.

To ensure anonymity, the participants are hereafter identified as P01 (headteacher) and P02 (coordinator of the self-evaluation team).

### **2.3 Data Collection and Analysis Procedures**

Data collection relied on the triangulation of three sources: i) institutional documents of the school cluster (Educational Project, Internal Regulations, the Headteacher's Intervention Project, the Strategic Action Plan, and the Self-Evaluation Report), obtained from the cluster's website and supplied by the headteacher; ii) the IGEC external evaluation report (2019/2020), obtained from the IGEC website; and iii) semi-structured interviews with the headteacher and the coordinator of the self-evaluation team.

The interviews were conducted in person between December 2024 and March 2025. They were audio-recorded with informed consent, fully transcribed, and the interviewees validated the transcripts. The interview guide was previously validated by an academic specializing in social science research and by two peers (a headteacher and a coordinator from another school cluster). It was refined based on the feedback received.

Thematic analysis (Braun & Clarke, 2013) followed an iterative process of coding and aggregation into themes and subthemes, supported by MAXQDA 24 software (VERBI Software, 2024). Initially, two researchers (first and second authors) independently coded the two interviews to define and stabilise the coding system (operational definitions, inclusion/exclusion criteria, and examples). Subsequently, independent double-coding of the two interviews was maintained, and divergences were discussed until consensus was reached, with the participation of the third author (peer debriefing). The research team is external to the case and has experience in analysing education policies and evaluating schools. To mitigate interpretative biases, a systematic record of analytical decisions (audit trail) and reflexive notes was kept throughout the process.

The final coding stabilised in a codebook with seven categories that organise the results: [C1] Characterisation of participants; [C2] PAEE as a catalyst for inclusion; [C3] Implementation of the improvement areas identified by IGEC and the role of leadership; [C4] Conditions and challenges in implementation; [C5] Monitoring and continuity (post-report); [C6] Use of the PAEE Reference Framework; and [C7] Participants' suggestions (lines of action). In line with reflexive thematic analysis, we privileged negotiated interpretative consistency within the team; therefore, inter-coder reliability coefficients are not reported.

In the subsections that follow (from 3.1 to 3.4) – Results and Discussion — the areas for improvement identified by IGEC are presented, the evidence (documentary and interview-based) is set out, and the actions implemented in the school cluster and their current stage of development are described. The inferences are supported by illustrative quotations linked to the participant (P01/P02) and by the code [Cx], which ensures traceability between data, analysis, and conclusions and strengthens the link to the study's objectives.

## **2.4 Ethical Considerations**

Given that the study involves human participants, the principles of research ethics were upheld (Shamoo & Khin-Maung-Gyi, 2021). Participation was voluntary and based on written informed consent. In accordance with the General Data Protection Regulation (GDPR) – Regulation (EU) 2016/679 (European Union, 2016) – confidentiality was ensured, as well as the right to withdraw at any time without consequences, the anonymisation of participants and the institution, and the secure storage of audio recordings and transcripts. The study received approval from the internal committee of the Ethics Council at the authors' institution (Opinion no. 64 – CED/2024, 6 November 2024), and authorisation from the Ministry of Education, received on 13 November 2024, via the School Survey Monitoring platform (MIME).

## **2.5 Limitations and Transferability**

This study has limitations. As a single-case study focused on one school cluster, the transferability of the findings to other contexts is limited. The interviews were conducted exclusively with the headteacher and the coordinator of the self-evaluation team; accordingly, the findings rest solely on the perspectives of these two leaders and may not fully reflect broader pedagogical practices. Likewise, the temporal scope – data collected between December 2024 and March 2025 – constrains the ability to track changes over time.

Transferability refers to the applicability of the findings in similar contexts, supported by a detailed description of the context, participants, and procedures (Given, 2008). In this study, the assessment relies on the characterisation of the school cluster, a transparent methodological account, triangulation of sources, and mapping between areas for improvement, evidence, actions, and their respective stages of development. Accordingly, any transfer requires contextual similarity and comparable local conditions.

## **3 Results and Discussion**

This section opens with a summary of the IGEC report focusing on inclusion and areas for improvement. The subsequent subsections align with the study's objectives: i) they describe P01 and P02's perceptions of the challenges and strategies for implementing the principles of inclusion; ii) they examine the role of the PAEE in promoting practices aligned with those principles and in organisational improvement; and iii) they identify leadership's contribution to mobilising resources, organising work, and sustaining inclusive pedagogical practices.

### **3.1 Summary of the IGEC report**

In the IGEC report, the highlighted strengths include: i) consolidated self-evaluation procedures, with data collection feeding into improvement actions; ii) leadership practices that mobilise internal resources and partnerships, engaging teachers in innovative projects; iii) diversity of provision and participation in initiatives that strengthen curricular autonomy and flexibility, promoting collaborative practices and a range of curricular options; and iv) the effectiveness of equity and inclusion measures, evidenced in the outcomes of students receiving socio-economic support and those benefiting from learning-support measures, as well as in the upward trend in completion rates in vocational education.

IGEC highlights the following areas for improvement: i) deepen the alignment of Self-evaluation with the Strategic Action Plan, focusing on identifying key areas of organisational development; ii) strengthen the involvement of students, parents/guardians and non-teaching staff in strategic planning, and improve internal and external communication; iii) deepen

formative assessment and institute shared lesson observation (collaborative supervision); and iv) raise attainment – particularly in lower secondary (third cycle) and upper secondary – reduce disparities in the 1st cycle (primary), and strengthen behaviour management to prevent classroom disruption.

### **3.2 Leaders' Perceptions: Challenges and Strategies in Implementing Inclusion**

Both participants value IGEC's external perspective. P01 notes that the PAEE prompts reflection and mobilises the school community; P02 considers it helpful in clarifying priorities and guiding educational practice, but warns against bureaucratic appropriation – purely formal, tick-box compliance with documentary requirements (such as completing templates and producing reports) without any change to day-to-day practice.

As challenges, P01 and P02 identify the following:

(i) human resources – a shortage of specialist staff and teacher turnover; (ii) insufficient timetabled time for collaborative work; (iii) operating conditions – overcrowded classes and facilities in need of refurbishment; and (iv) student diversity and multiculturalism (approximately thirty nationalities). In addition, the geographical dispersion of the schools in the cluster, a heavy administrative paperwork burden, and limited opportunities for professional development hinder the sustainability of change. They also note the absence of routines for collaborative supervision and systematic formative assessment. As P02 summarises: “In practice, the real needs of all students are not met, as there is insufficient human capacity to respond to every case” [C4]; “large class sizes are a major difficulty, and behaviour issues have increased” [C4].

In response to the identified challenges, the school leaders have been implementing inclusion strategies focused on pedagogical coordination, in-class support, and the monitoring of students. P01 reports that they are “reviewing the language mentoring programme to support students with a foreign background, which aims to identify students capable of supporting peers newly arrived at the cluster” [C3], and acknowledges the difficulty of “engaging parents and families in school activities, particularly in upper secondary education” [C4].

The documented practices reported by participants include: (i) the creation of shared coordination periods, enabling collaborative planning, sharing of practice, and pedagogical monitoring (still insufficient for the systematic work required); (ii) strengthening the Multidisciplinary Team for Inclusive Education Support (EMAEI) to ensure integrated identification of needs and monitoring of learning-support measures; (iii) reorganisation of the Learning Support Centre (CAA), geared towards in-context support and mediation of curricular accessibility; and (iv) co-teaching in Portuguese and Mathematics as a model that promotes pedagogical differentiation in the classroom. In addition, projects, semester-long subjects, Domains of Curricular Autonomy (DAC), study rooms, mentoring, and specific tutorial support aim to broaden learning opportunities [C3]. The maturity of these arrangements remains uneven, and coverage across year groups and subjects is still asymmetrical [C4].

At the level of planning and management, strategic mechanisms for implementing inclusion are identified: (i) the Action Plan for Inclusion, integrated into the Strategic Action Plan and universal in scope (covering all children and young people), which structures the coordination and regulation of provision but has no dedicated time allocation, thereby weakening its operationalisation [C3; C4]; and (ii) the Headteacher's Intervention Project, which provides for collaborative supervision and periodic evaluations as mechanisms for pedagogical oversight and monitoring [C3]. According to P01 and P02, implementation is partial and requires consolidation; weaknesses persist in coordination across structures and in

team turnover, particularly within the self-evaluation team, undermining the coherence and continuity of practices [C4; C5].

The perceptions gathered converge with proposals advocating organisational reconfiguration around pedagogical teams with the time and authority to plan, decide and monitor curriculum and learning, thereby reducing teacher isolation and fragmentation (Pineiro et al., 2025). At the same time, they echo António Nóvoa (2022) call for a metamorphosis of the school, grounded in structural and cultural change rather than mere instrumental adjustments.

### **3.3 Role of the PAEE in Promoting Educational Practices Aligned with the Principles of Inclusion and Organisational Improvement**

Following the publication of the IGEC report, responses have been observed that align with the areas for improvement identified across the four domains of the PAEE Reference Framework (Self-evaluation, Leadership and Management, Provision of the Educational Service, and Results), as well as greater coherence between strategic decisions and internal monitoring [C3]. For P01, “the IGEC’s external gaze is like a critical friend; it helps the school to reflect and grow”, with the PAEE contributing as a mechanism for alignment and legitimation, clarifying priorities and stabilising a common working language – shared concepts, criteria and indicators – that guides intervention [C2; C3; C6].

The post-report phase emerges as a critical factor. P01 proposes networking between schools for the sharing of ideas and an annual scrutiny of what has been achieved: “It would be valuable if, at the end of the year, there were networked collaboration to discuss and evaluate what has been implemented and what should be improved” [C7]. In turn, P02 points to the need for more regular IGEC visits and consistent internal monitoring, to prevent the initial momentum from dissipating over time: “Ideally, IGEC visits should be more regular.” P02 also highlights the formative nature of the process: “We were told that the aim was not only to evaluate, but to understand how the school operates and to guide improvement” [C5; C7]. Both note that, without a systematic follow-up mechanism, the Reference Framework tends to lose relevance in day-to-day organisational practice.

The gap between strategically aligned decisions and pedagogical effects, according to both leaders, is due to the insufficient frequency of monitoring and instability within the self-evaluation team, which weakens the link between the evidence gathered and instructional decision-making. Thus, the PAEE’s contribution depends above all on the quality of follow-up routines – analysis, feedback, and organisational learning – that anchor priorities in school practices [C5].

In summary, in the school cluster studied, the PAEE catalyses focus and coherence; however, translating this into sustained improvement requires institutionalising networked collaboration (P01), follow-up with a defined cadence, and the stability and valorisation of self-evaluation (P02), in line with evidence that emphasises a shared purpose and multi-level leadership to sustain system change (Ainscow & Chapman, 2025). Moreover, change entails reconfiguring organisational structures around educational teams supported by collaborative leadership, working based on trust and complementarity (Pineiro et al., 2025).

### **3.4 Leadership’s Contribution to Resource Mobilisation and Management to Sustain Inclusive Practices**

Participants report that both internal and external resources have been mobilised to give effect to the vision and mission of an inclusive school. There has been closer monitoring of students who benefit from learning-and-inclusion support measures and an expansion of collaborative practices, although this is still short of the desired level. P01 highlights the

expansion of partnerships and formal agreements – namely therapies for students in the Multiple Disabilities Unit and the provision of inclusive sports disciplines (boccia and adapted swimming) – and the linkage of the Learning Support Centre with the arts, diversifying responses and opportunities for participation; nonetheless, P01 stresses that it is “essential to strengthen multidisciplinary teams, ensuring more specialised human resources” [C4]. In parallel, student-voice mechanisms have been created (VAL—Students’ Voice and delegates’ assemblies) and regular meetings with form tutors have been intensified, reinforcing close pedagogical governance [C3]. P02 adds that the self-evaluation team “should be an independent body and have autonomy over data collection and analysis” [C5; C7].

The leaders note that the sustainability of change depends on engaged teachers with permanent appointments, protected time<sup>1</sup>, and access to continuing professional development.

At the normative-organisational level, the Internal Regulations structure the class councils and pedagogical teams and, where necessary, provide for the involvement of the Psychology and Guidance Service (SPO) and Special Education; they also assign to the form tutor responsibility for coordinating joint planning, curriculum alignment, formative assessment, and the management of support – arrangements that are central to inclusion.

To strengthen evaluative capacity and align management instruments, the school cluster sought technical support from an external specialist organisation. P01 notes that, to refine the cluster’s self-evaluation process, they “entered into a partnership with an external specialist organisation, procuring an outsourced service” [C3]. In this context, P02 identifies contributions and recent improvements: the self-evaluation team has been expanded to include students, parents, and non-teaching staff, as well as closer coordination with leadership (the headteacher has joined the team). However, P02 highlights management obstacles to be mitigated: team instability (annual replacements), the absence of protected time for meetings, and insufficient recognition of the work carried out [C4]. P02 proposes a minimum stability of three years for 50% of team members and ring-fenced time in the timetables of teaching and non-teaching staff [C7]. P02 also calls for greater transparency (systematic publication of self-evaluation reports on the cluster’s website) and a more regular monitoring cadence, to be ensured by that team, “to guarantee the continuity of changes, given that monitoring is not yet taking place systematically” [C5; C7].

## **4 Conclusion**

This study shows that the PAEE has the potential to advance inclusion, although its effectiveness depends on committed leadership, teacher engagement, and sustained systemic support. In the case analysed, the PAEE acted as an initial catalyst by clarifying strategic priorities and lending legitimacy to decisions. Beyond that initial impetus, it falls to leadership to interpret the areas for improvement identified by IGEC, mobilise and coordinate teams, and ensure follow-through (monitoring, feedback, and adjustments). The pedagogical realisation of inclusion, in turn, depends on teachers’ practice, which requires structural conditions: team stability, protected time for collaboration, institutional recognition, and regular access to continuing professional development.

To strengthen the impact of the PAEE on inclusive education, four lines of action are proposed: i) institutionalisation of a continuous monitoring system, coordinated by the self-

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<sup>1</sup> Protected time denotes a timetabled period with allocated hours and a non-interference rule, reserved for collaboration, meetings and monitoring; it must not be used for other tasks.

evaluation team, with key indicators for each priority, systematic evidence collection, feedback and communication of adjustments; ii) collaboration between schools, through networks for sharing practice, cross-school peer observation, and professional learning communities; iii) better coordination between IGEC, school leadership, and local authorities, with post-report follow-up protocols (defined responsibilities, monitoring schedules, and communication channels) and alignment of resources and priorities; iv) increased investment in capacity-building and staffing stability, through leadership development and teachers' continuing professional development (co-teaching, formative assessment, differentiated teaching practices) and structural conditions (secure contracts, timetabled hours, and systematic follow-up and evaluation of inclusion measures).

In summary, the PAEE promotes inclusion when it ceases to be a one-off event and becomes a cycle of organisational learning: leadership that interprets the areas for improvement and mobilises teams; teachers in stable, permanent posts engaged in continuing professional development; and sustained, system-level support that ensures the time, resources, and coordination needed to translate priorities into sustained inclusive pedagogical practice.

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