

The Role of Middle Leadership in Promoting Inclusive Education Policies through the Participation of the Educational Community in Portugal

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Abstract

In Portugal, the legal framework creates conditions for increased participation of the educational community in promoting inclusive education. Measures to support student learning and inclusion highlight the role of middle-tier structures in promoting this participation. In line with this, international organisations also emphasise the same direction, showing political alignment at both national and transnational levels. The study follows the theoretical-methodological proposal of Stephen Ball's policy cycle with data analysis following the thematic analysis method. In this article, via an analysis of international and national documents, it is demonstrated how the relevance of the participation of the educational community emerges as a theme in inclusive education, as well as how this theme is interpreted and translated in the context of practice by middle leaders through interviews. The results show a lack of articulation between the policies advocated by transnational organisations and the practices reported by coordinators (middle leaders) of Multidisciplinary Support Teams for Inclusive Education particularly in terms of inclusion and participation in the educational process.

Keywords

Middle leadership, inclusive education policies, participation of the educational community, policy cycle

To cite this article: Carvalho, A. E. & Veiga, A. (2024). The Role of Middle Leadership in Promoting Inclusive Education Policies through the Participation of the Educational Community in Portugal. *International Journal of Educational Leadership and Management*, 12(3), pp. 225-247 <http://dx.doi.org/10.17583/ijelm.14928>

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El Papel del Liderazgo Intermedio en la Promoción de Políticas de Educación Inclusiva a través de la Participación de la Comunidad Educativa en Portugal

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Resumen

En Portugal, el marco jurídico crea las condiciones para una mayor participación de la comunidad educativa en la promoción de la educación inclusiva. Las medidas de apoyo al aprendizaje y a la inclusión de los alumnos destacan el papel de las estructuras de nivel medio en la promoción de esta participación. En esta línea, las organizaciones internacionales también hacen énfasis en la misma orientación, mostrando un alineamiento político tanto a nivel nacional como transnacional. El estudio sigue la propuesta teórico-metodológica del ciclo político de Stephen Ball. El análisis de los datos siguió el método de análisis temático. En este artículo, demostramos cómo la relevancia de la participación de la comunidad educativa emerge como tema en la educación inclusiva a través del análisis de documentos internacionales/nacionales, así como cómo este tema es interpretado y traducido en el contexto de la práctica por los líderes intermedios a través de entrevistas. Los resultados revelan una falta de articulación entre las políticas abogadas por las organizaciones transnacionales y las prácticas reportadas por coordinadores (líderes intermedios) de Equipos Multidisciplinares de Apoyo a la Educación Inclusiva particularmente en términos de inclusión y participación en el proceso educativo.

Palabras clave

Liderazgo educativo intermedio, educación inclusiva, participación de la comunidad educativa, ciclo de políticas

Cómo citar este artículo: Carvalho, A. E. y Veiga, A. (2024). The Role of Middle Leadership in Promoting Inclusive Education Policies through the Participation of the Educational Community in Portugal. *International Journal of Educational Leadership and Management*, 12(3), pp. 225-247 <http://dx.doi.org/10.17583/ijelm.14928>

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UNESCO (2015) highlights the vital role of education for the overall success of the 2030 Agenda. It is argued that the progress of all the Sustainable Development Goals (SDGs), especially those that integrate targets relating to health, growth, employment and production, depends on the pursuit of SDG 4, which aims to "Ensure access to inclusive, quality and equitable education and promote lifelong learning opportunities for all". It is further recognised that guaranteeing learning opportunities for all is a predictor of more economically sustainable societies (OECD, 2003, 2012a; WB, 2016; CEU, 2018) and upward social mobility (WB, 2022). In line with this, various international organisations have produced guidelines for the development of more inclusive education systems, through conventions, declarations, recommendations and reports, which, according to Ball (2001), are reflected in other levels of education policymaking, such as the national and local. These documents recognise and disseminate the idea that more inclusive education necessarily depends on expanding the educational community¹ (UNESCO, 2008; OECD, 2012b), both by increasing the number of educational actors that form it and by increasing their role in regulating education. This can open up space for the construction of a school form in which educational processes are built on a relationship in which all educational actors play an important role. This idea that has been identified since the Salamanca Declaration, in which calls are made for schools to encourage the participation of the educational community in decision-making (UNESCO, 1994). Along these lines, there are several international researchers (Epstein, 1983; Garcia, 2002; Weiss, 2005; Kyriazopoulou & Weber, 2009) that highlight the benefits of the participation of different educational actors in education for reducing the risk of social exclusion, especially when it comes to students from more vulnerable groups². Family participation (Ramberg & Watkins, 2020) and student participation (Booth & Ainscow, 2002; Echeita, 2017) in decision-making processes are considered a common dimension of all inclusive schools (Tejeiro, 2024) and appear as a recommendation for promoting inclusion in various political texts of international/national organisations. Several studies (Spillane, Halverson & Diamond, 2001; Padrós & Flecha, 2014; Neves, Almeida & Ferreira, 2023) show that leadership has a direct influence on how the participation of educational communities develops. In line with this, UNESCO (1994) and European Agency for Special Needs and Inclusive Education (EASNIE, 2021) underline the role of leadership in promoting the participation of the entire educational community and define the commitment to inclusive education as a process that aims to respond to the diversity of students' needs through increased participation of all actors in the educational community (UNESCO, 2008).

In the Portuguese national context, since 2008 (Decree-Law 75/2008), the Ministry of Education has centralised school leadership in a single-person body – the director – justifying that the measure had the aim of improving the effectiveness of policy implementation. Notwithstanding the issue of effective implementation concerning the promotion of more inclusive education, existing research (Miškolci et al., 2016; Tejeiro, 2024) has linked the development of inclusive practices to distributed leadership, in which the role of middle-tier leaders is emphasised. Leadership that is shared across different levels of the school, including middle leadership, has been shown to positively impact the implementation of inclusive policies and practices (Spillane, Halverson & Diamond, 2001; Harris, 2004). In line with this, the National Council of Education (CNE, 2012) recommended greater delegation of power to

middle-tier structures in schools. Similarly, the Directorate-General for Education (DGE) (2018), in its Support Manual for Practice for Inclusive Education, underscores the importance of middle-tier leaders in fostering inclusion in school contexts. In addition, the (EASNIE; 2014) emphasises the need for greater involvement of intermediary structures for inclusive leadership, which plays a key role in driving inclusive practices and creating equitable learning environments.

In 2018, the Legal Framework for Inclusive Education (LFIE), established by Decree-Law 54/2018 and revised by Law 116/2019, introduced "changes to the way schools and their support structures are organised" (Preamble, Decree-Law 54/2018). Among the main changes was the creation of the Multidisciplinary Support Team for Inclusive Education (MSTIE), an organisational structure that takes a broad, integrated and participatory view of all those involved in the educational process and in mobilising the most appropriate learning and inclusion support measures (LISM) (DGE, 2018) for each student. The MSTIE is made up of permanent and variable members. The permanent members include a teacher who assists the headmaster, a special education teacher, three members of the Pedagogical Council representing different levels of education and a psychologist, one of whom is appointed by the headmaster as coordinator of the MSTIE. The variable members include, obligatorily, the head teacher/class director and the guardian, and depending on the school situation under analysis, other members that the MSTIE coordinator considers appropriate. These may include internal or external school professionals who accompany the student in a clinical/therapeutic context or representatives of partner organisations that intervene in the student's educational project, namely when they host individual transition plans³. The obligation for the guardian to set up and participate in the MSTIE was introduced in the revision of the LFIE with Law 116/2019. This legislative revision strengthened the role of the guardian, giving them the right (and duty) to be involved in the entire educational process of their children, as well as making the MSTIE responsible for ensuring this participation. The regulatory role enacted by the state regarding MSTIEs is characterised by ensuring leeway that requires an integrated and continuous analysis of the various school situations. This leeway also requires more participatory and committed decision-making processes. According to the literature, shared decision-making in educational processes fosters greater commitment to these decisions, thereby reducing the likelihood of maladjustment and even social exclusion, and thus contributing to social cohesion (Delgado, 2006).

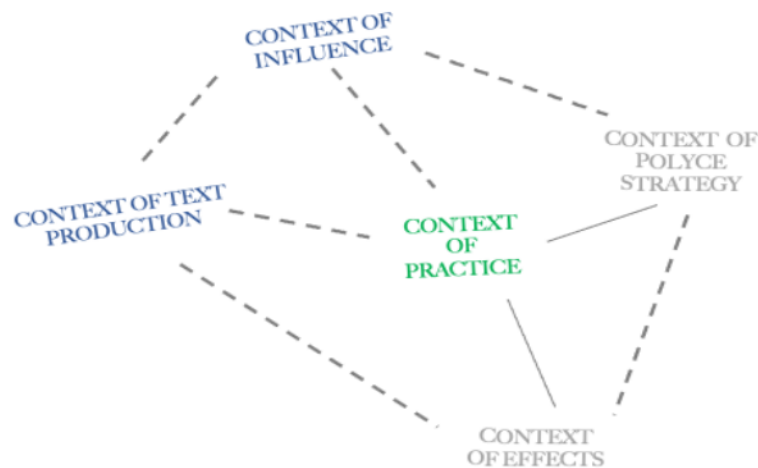
In this vein, the way MSTIE was conceived is understood to create conditions for expanding the educational community – both in the number of actors and in the power of action – in the processes of analysis and decision-making regarding students' school situations. It also reflects the assumption that the development of a more inclusive education depends on middle-tier leadership within the school organisation. Notwithstanding the international/national guidelines that point to the promotion of the educational community's participation, the educational policymaking process is not concluded with the publication of the text (Bowe, Ball & Gold, 1992). It is subject to interpretation and translation by the actors operating at the local level of policy – in this case, the schools – producing effects that may represent processes of resistance or processes of accommodation and identification with respect to the official policy proposal (ibid). Thus, assuming the political process as something complex that forms in a dialectical relationship at transnational, national, and local levels, the policy cycle is mobilised

as a theoretical-methodological device designed to access how policy develops in its various political arenas (Veiga, 2012).

There were three contexts of policy implementation in the initial policy cycle: the context of influence, the context of text production and the context of practice (Bowe, Ball & Gold, 1992); later it was extended with the context of effects (results) and the context of policy strategy (Ball, 1994), both of which can be analysed from the context of practice, as they report on its feedback (Veiga, 2012, 2014) as represented in Figure 1. According to this approach, policy does not have an isolated and circumscribed origin; it is formed in the interaction of the five policymaking contexts.

Figure 1

Representation of Stephen Ball's policy cycle (Carvalho, Cosme & Veiga, 2023a)



The context of influence and the context of text production are symbiotically linked (Bowe, Ball & Gold, 1992: the former refers to the space in which certain ideas acquire legitimacy and are presented as solutions through international organisations, namely through conferences where the results of studies are disseminated and proposals for action are discussed, and the latter refers to the texts that derive from these debates and which represent policies such as conventions, declarations, recommendations, legal documents, etc. The context of practice is where policy is subject to interpretation and recreation by local actors with effects and consequences that can represent significant changes and transformations in the official policy proposal. Bowe, Ball and Gold (1992, p. 22) argue that "professionals working in the context of practice [schools, for example] do not face policy texts as naïve readers, they come with their histories, experiences, values and purposes (...)" meaning that "(...) Parts [of texts] can be rejected, selected, ignored, deliberately misunderstood, rejoinders can be superficial, etc." The context of effects is related to what the practices change (whether they promote standards of access, opportunities, social justice, etc.), determining whether or not there is a need for a strategic reorientation of the policy. In turn, the context of policy strategy deals with the effects of the policy (Veiga, 2012, 2014) and the need to reorient the objectives, which can be linked to the reflexivity (Giddens, 1991) of the actors who interpret and translate the policy.

Prior to this study, we analysed the contexts of influence and text production of inclusive education policy in the (inter)national sphere. From this analysis we identified four themes that underpin the concept of inclusive education: the recognition of diversity, the fight for equity, the autonomy of schools and the participation of the educational community (Carvalho, Cosme & Veiga, 2023b).

In this article, the intention is to show how the theme of participation by the educational community is i) defined by the (inter)national guidelines and ii) interpreted and translated by MSTIE coordinators (middle leaders), accessing the context of the practice of this policy cycle.

Therefore, the following research questions were established: How is the theme of participation by the educational community defined in the (inter)national guidelines on inclusive education? How do the coordinators of the MSTIE interpret and translate the theme of the participation of the educational community in the context of practice?

Methodology

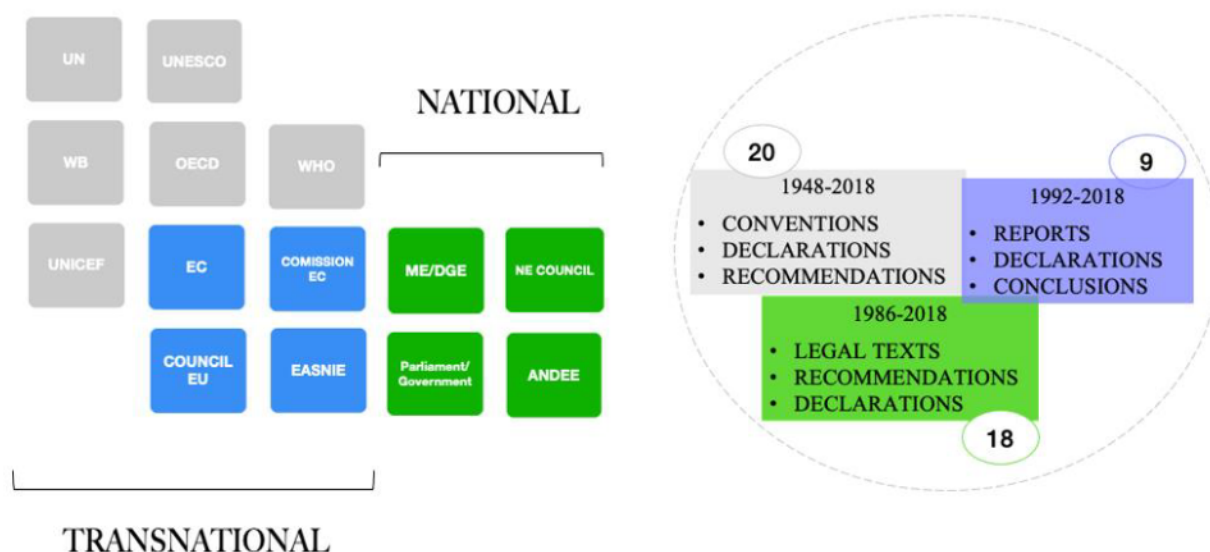
In this section, the following is outlined: i) the materials used in the study (including the organisations involved, types of texts, and the publication timeframe of the documents analysed to examine the context of influence and text production of the inclusive education policy) which led to the identification of four key themes, including the promotion of community participation; ii) the participants of the study, detailing the informants and the corresponding coding used to present the results; and iii) the data collection and analysis processes employed throughout the study.

Materials

Figure 2 shows the global, European and national organisations and the respective types of documents that were analysed. The documents selected for this study are those identified by the DGE on its website at the time of data collection as the official guidelines for inclusive education. This selection is justified by the competencies of this central state service, which include overseeing the implementation of policies across pre-school education, primary and secondary education and out-of-school education, in accordance with Decree-Law 266-G/2012. In addition to these guidelines, other texts were also gathered, such as conventions and declarations from transnational organisations, which are referenced within the DGE documents.

Figure 2

National and International Organisations and Respective Types of Texts Analysed



Participants

In school contexts, semi-structured interviews were carried out with MSTIE coordinators from five school clusters (SCs). To select the SCs, we opted for a representative sample of the five regional organic units of the Directorate-General for School Establishments, choosing one SC from each region: Algarve, Alentejo, Lisboa e Vale do Tejo, Centro, and Norte. The SCs were selected using a convenience sampling method. Consequently, four SCs were chosen from the regions of Alentejo, Lisboa e Vale do Tejo, Centro, and Norte, all of which are partners of the Observatory of Life in Schools (OBVIE), a structure within the Centre for Educational Research and Intervention (CIIE), where the authors are based. In the Algarve region, OBVIE had no partners, and one SC was selected where one of the authors had previously conducted research.

Table 1

Study Informants

FUNCTION	REGION	CODE
Coordinator of the Multidisciplinary Support Team for Inclusive Education (MSTIE)	Algarve	CEM001
	Alentejo	CEM002
	Lisboa e Vale do Tejo	CEM003
	Centro	CEM004
	Norte	CEM005

The interviews were carried out online at the most convenient time for each participant via the Zoom Colibri software. The interviews were transcribed manually and returned for validation to ensure that the answers accurately reflected the informants' perceptions. During the process of each transcription, observations were recorded, with this moment being considered a first analysis of the information conveyed during the interviews (Rapley, 2014).

Each transcript was assigned a code (see Table 1) which is used as a means of citation in the results of this article.

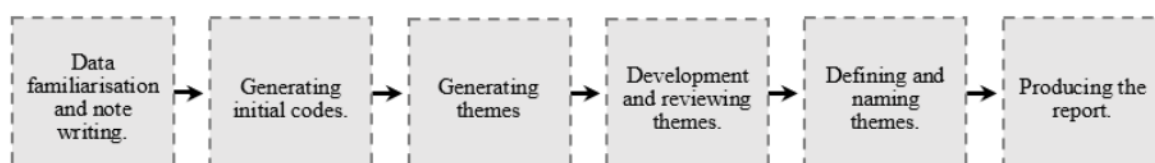
Data Analysis Process

Analysis of the data – documents and interviews – followed Braun and Clarke's thematic analysis (TA) (2006, 2021), a method that encourages the researcher to embrace reflexivity, subjectivity and creativity as assets in the production of knowledge (Braun & Clarke, 2019). We used inductive and deductive bidirectional analysis, which helps to increase rigour in data analysis (Fereday & Muir-Cochrane, 2006; Braun & Clarke, 2013).

Firstly, an inductive TA of the international texts was undertaken, moving backwards and forwards in identifying ideas and naming themes; in analysing the national texts and interviews, we were guided by the themes previously generated in the analysis of the international texts, which contributed to a deductive dimension of the analysis. The NVivo programme, software that helps organise and analyse information, was used in the data analysis process (Zamawe, 2015; Allsop et al., 2022). After importing the set of texts into NVivo, we followed the six phases⁴ of the TA method, as shown in Figure 3. Through this analysis, the overarching theme of ‘promoting the participation of the educational community’ was identified, which is further supported by three sub-themes: ‘mobilising community institutions to design measures to support learning and inclusion’, ‘recognising the student's right to participate in the design of their educational project’, and ‘guaranteeing the right of guardians to participate in decision-making processes’.

Figure 3

Stages of the Thematic Analysis Method (Adapted from Braun and Clarke, 2006, 2021)



Results and Discussion

In this section, the research questions are addressed by means of a thematic analysis of documents and interviews. The document analysis provided insights into how the promotion of participation within the educational community is framed and established as a prerequisite for inclusive education. Additionally, the analysis of semi-structured interviews with MSTIE coordinators (middle leaders) from various schools offered a more thorough understanding of how the participation of the educational community is perceived and promoted.

The theme of participation of the educational community is underpinned by statements (see Table 2) that point to the importance of promoting the participation of students, guardians and external stakeholders in decision-making processes (Ballesteros, Aguado & Malik, 2014) with a view to pursuing jointly defined objectives aimed at enriching students' academic and

personal trajectories (García & Rosel, 2001). In the statements in Table 2, the active participation of the actors listed is seen as fundamental to strengthening the quality of education, guaranteeing the representativeness of decisions and promoting an approach that is more centred on students' needs and interests.

Table 2

Documents and Statements that Generated the Theme of Participation by the Educational Community

Mobilising community institutions – such as local councils, local politicians, associations, private sector organisations, other schools – to design measures to support learning and inclusion.	
"Encourage community participation, supporting representative associations and inviting them to participate in decision-making."	Salamanca Declaration (1994)
"Close coordination with the local community, promoting integrated resource management (...)"	Legal Regulation 147-B-ME-96
"Schools can work with other organizations and communities to develop educational opportunities and promote social conditions within their localities."	CSIE (2002)
"Promote partnerships between schools, local policymakers (...) to ensure greater accountability for services provided"	EADSNE (2009)
"Several authors highlight (...) the importance of improving community presence in schools."	INCLUD-ED Consortium (2009)
"Building links with the communities around schools, both business and social stakeholders, can also strengthen schools and their students."	OECD (2012b)
"Civil society (...), the private sector, communities (...): all play important roles in realizing the right to quality education."	Incheon Declaration (2015)
"Involvement of the local community and employers to increase the relevance of curricula and work opportunities."	EASNIE (2017)
e) Participation of the educational community"; "m) Collaboration with local authorities"; "n) Partnerships with business entities."	Law 31/2002
"The program of the XVII Constitutional Government identified the need to review the legal regime of autonomy, administration, and management of schools towards strengthening the participation of (...) communities."	Decree-Law 75/2008
"It is expected, therefore, that mechanisms and strategies for educational response will be developed in schools and with schools (...) through partnerships with community institutions."	CNE (2014)
"Schools can develop partnerships among themselves, with local authorities, and with other community institutions that allow synergies, competencies, and local resources to be enhanced, promoting coordinated responses."	Decree-Law 54/2018
Recognising the student's right to participate in the design of their educational (with respect to their expectations, preferences, potential and needs) in school organisation and in decision-making processes.	
"Active and participatory approaches are particularly valuable in ensuring learning and enabling students to fully realize their potential."	Jomtien Declaration (1990)
"Increased student participation in the culture, curriculum, and community of their schools."	CSIE (2002)
"Recognizing the importance for people with disabilities of their	Convention on the

autonomy and individual independence, including the freedom to make their own choices"; "(...) people with disabilities should have the opportunity to be actively involved in decision-making processes (...) including those that directly concern them"; "The fact that a child has a disability should not prevent their opinion from being considered."	rights of persons with disabilities (United Nations, 2006)
"The voices of students (...) should be heard, especially when decisions affect their lives."	EADSNE (2011)
"The voices of children with disabilities themselves must be heard, though they frequently are not. In recent years children have been more involved in studies of their experiences of education."	WHO & WB (2011)
"All students should be active decision-makers in their learning and assessment processes."	EADSNE (2012)
"Taking into account not only the needs of the student but also their interests and preferences, the expression of their cultural and linguistic identity, creating opportunities for the exercise of the right to participation in decision-making."	Decree-Law 54/2018
"Schools should promote student engagement, defining regular procedures for listening to and involving students in designing curriculum options and evaluating their effectiveness in learning."	Decree-Law 55/2018
Guaranteeing the right of guardians to participate in decision-making processes.	
"Parents are privileged partners when it comes to their children's special educational needs and, as far as possible, they should be given a choice about the type of educational response they want."	Salamanca Declaration (1994)
"Encourage decisive, evaluative and educational types of family participation."	INCLUD-ED Consortium (2009)
"The family is the first source of education for a child, and most learning occurs at home. Parents are frequently active in creating educational opportunities for their children, and they need to be brought on board to facilitate the process of inclusion."	WHO & WB (2011)
"The involvement of parents in their children's education is a key factor in the development of trusting relationships between schools and families."	EASNIE (2014)
"Participating in the educational information and guidance process in collaboration with families."	Law 46/86
"The role of parents or guardians is strengthened, giving them a set of rights and duties leading to their involvement in the entire educational process of their children."	Decree-Law 54/2018
"The school must ensure the informed participation (...) of parents and guardians in the learning assessment process, systematically promoting the sharing of information, involvement and accountability of the various players (...)"	Decree-Law 55/2018
"Participate in the multidisciplinary support team for inclusive education, as a variable member"; "Participate in drawing up and evaluating the technical-pedagogical report, the individual educational programme and the individual transition plan"; "Requesting a review of the technical-pedagogical report, the individual educational programme and the individual transition plan, when these apply."	Law 116/2019
"Parents play a fundamental role in their children's education, and it is up to the school to encourage their participation by improving	DGE (2018)

communication, attitudes and the involvement of families in their children's education."

External stakeholders are one of the groups in the educational community and their participation is highlighted by various organisations as a *sine qua non* for the development of more inclusive schools. UNESCO (1994, 2015), the European Agency for Development in Special Needs Education (EADSNE, 2009) and the OECD (2012b) recommend promoting partnerships between schools and local political leaders, social partners and the private sector, in order to create joint responses for more inclusive and democratic education in schools. In the national context, Law 31/2002, which establishes the evaluation system, and the Legal Regulation 147-B-ME-96, which establishes the "Educational Territories of Priority Intervention", highlight the importance of close liaison with the local community, collaboration with local authorities and the promotion of partnerships with business entities as a way of ensuring greater accountability of educational services; this collaboration adds actors to school organisations and educational processes, recommends the integrated management of resources and reconfigures the relationship between schools, local authorities and the private sector. In the CNE's (2014) recommendation on public policies for special education, requested by the Assembly of the Republic in Deliberation no. 2 – PL/2014, states that it is expected that "educational response mechanisms and strategies be developed in the school and with the school (...) using partnerships with community institutions", also supporting this perspective that solutions should come from the territory and the relationship with the territory.

Students, a group of actors in the educational community, are increasingly considered in guidelines for more inclusive education systems. Several organisations stress the importance of involving them more actively in the educational process, recognising them as active decision-makers in their own learning (CSIE, 2002). It is emphasised in various statements that it is through the participation of students that space is opened up for their voices to be heard, their experiences to be considered and their needs to be met more effectively. In this respect, the WHO and WB (2011) refer to the need to listen to children's voices and actively involve them in studies about their experiences in schools. EADSNE (2012) argues that all students should be active decision-makers in their learning and in the evaluation of educational processes, an approach that contributes to students' protagonism, stimulating their motivation to learn, and the development of self-management, collaboration and participation skills, which are fundamental to the development of a fairer, more democratic society. According to several authors (Urquhart, 2001; Cook-Sather, 2002; Flutter, 2007; Morgan, 2009) it is essential to involve students' perceptions in the processes of change aimed at more inclusive and democratic school organisations. This idea is present in Decree-Law 54/2018 and Decree-Law 55/2018, which give students a role in the design of curricular options and in decision-making processes about their school career.

The participation of guardians is increasingly valued as a condition for promoting more inclusive education. In the national context, this idea is expressed timidly in Decree-Law 46/86 and gradually and consistently in the various legal texts following the Salamanca Declaration (UNESCO, 1994), which gives it special prominence. The WHO and the WB (2011) emphasise the power of the family – as the child's first educational context – in the process of including children in school, and it is essential to guarantee their participation. At national level, Decree-Law 55/2018, Decree-Law 54/2018 and Law 116/2019 reinforce the role of guardians/parents

in the educational process, giving them rights and duties that promote their involvement and accountability. Studies by Barr and Saltmarsh (2014) support the positive impact of family involvement in school on students' school experiences and academic results.

The analysis revealed that the context of influence and text production on inclusive education in Portugal provides a strong framework emphasising the promotion of participation by the educational community –external stakeholders, students, and guardians/parents – as a central element in fostering a more inclusive and democratic educational system. However, translating these guidelines into practice in schools is contingent on institutional actors, including middle management, namely the coordinators of the Multidisciplinary Support Teams for Inclusive Education (MSTIE). The analysis of the context of practice revealed that the way MSTIE coordinators understand and promote the participation of the educational community varies considerably, reflecting the different school circumstances and local challenges.

With regard to student participation in the mobilisation of LISM, the coordinators have different perceptions of the importance and feasibility of this participation. For example, CEM002 and CEM005 stress the importance of actively including students in the decision-making process, recognising the validity of their perspectives:

The student is listened to by the head teacher (...) and in the variable team meetings, the students are often also present so that they can be heard, and their perspective is also valid for decision-making. (CEM002)

They take part in the meetings where we make decisions about them, with them, because they are the centre of why we are there; we are making decisions about their path, their lives, and without involving them it wouldn't make much sense. (CEM005)

CEM004 affirms the participation of students in this process, although he does not lend great importance to it in decision-making:

Of course. (...) I'm not going to say it's the first [student perspective] to be considered. But it is considered (...) (CEM004)

Other coordinators reveal that student participation is promoted according to their ability profile, and there may be situations in which there should be no participation (CEM001) or residual participation (CEM003):

So, those who have some notion, who are quite functional, have a sense of reality and understand, yes. But there are other students who are non-verbal, who don't really understand what we're saying, and it doesn't make sense for them to go to the meeting either. (...) So for some students it doesn't make sense (...), students who are more complicated and can't even sit in a meeting. So there's no point in exposing students to this role, which is not dignified at all. (CEM001)

So, of course, when we're talking about students (...) with marked difficulties in terms of learning, cognition, interaction, that's it. So they themselves have difficulty collaborating, of course. But yes, they are involved, and we ask them, more in terms of "what do you like best", don't we? Because they're not students who I can say have a clear idea of what they want to be or what they want to do. (CEM003)

The participation of the guardians/parents in the process is perceived and promoted differently by the MSTIE coordinators. For some coordinators (CEM001, CEM002, CEM003

and CEM005), the participation of guardians is absolutely essential for planning and deciding on the LISM to be applied:

(...) at the MSTIE, decisions are taken jointly with the participation of the permanent members and the variable members that are called in, depending on the school situation that is being analysed. But there's always the head teacher or the class director and the person in charge."; "(...) they [the guardians] often get emotional because the case of their son or daughter, their child, is treated very seriously. So I see that the parents are grateful, grateful that the large team, with many members, is looking into their child's school situation, their child's future, and that everyone is concerned that there should be an improvement, that there should be concrete help for that specific case."; "(...) So parents are always involved in this whole process, especially the parents of pupils with significant curricular adaptations, which are often very complex, very difficult situations and there has to be a whole team thinking about and working on this situation. (CEM001)

(...) the [meetings] are always called with the guardian. I think there is greater participation by the parents in the teams and in their children's experiences, and there is this greater participation through these teams that have been formed by the variable members of the MSTIE. (CEM002)

Now [after the LFIE] they feel they are an integral part of the pupils' educational process, and in the past I don't think they did, did they? (...) Not now. They really are, they're part of the process. And that's why we make sure they all come to the school when we draw up the documents, and we're the ones who receive them and listen to them, aren't we? And to realise that sometimes there are changes that have to be made to the documents, which we do. (...) So they're the people who know the student best. In the same way, in terms of evaluating the measures, the parents are also called to the school, and they also give their input on the measures and also give their opinion (...) In the past this didn't exist. (...) I think the parents have this notion, that they are much closer to the school. And they really are, they really are. I think the school opens its doors to parents a lot more. That's for sure. And they feel that. (CEM003)

It starts with a formal moment, which is inviting the family to take part in the MSTIE meeting, which is hardly a one-off... because this is a process. So, from the outset, first without the student yet, we meet with the guardian, explain the objective, (...) so when they don't know what the regulatory framework is, we explain it to them (...) (CEM005)

One coordinator (CEM004) does not attribute much importance to the participation of the guardians, mentioning that when the MSTIE structure was set up, these actors were integrated into the meetings, but that they are currently only called to participate when the school situation raises doubts:

At the beginning, when the MSTIE came into being in 2018, we were holding these meetings more frequently and with more members, and then we realised that it wasn't feasible. It's not possible. So what we try to do is analyse the documents we receive and, if there is any doubt, if there is any ambiguity, then we arrange a meeting with the wider team, the technician, the teacher and the parent.

When CEM004 was asked why it wasn't "feasible" to integrate the EE into the MSTIE meetings, the coordinator mentioned the longer meetings and the discrepancy between the language used by the MSTIE and the language used by the EE as obstacles:

(...) longer meetings, more difficult, because of the differences in vocabulary. When we're with parents, there are things that have to be said differently, logically. Processes have to be explained and it takes longer. And then, ultimately, the end result wasn't so fantastic that we could say it was

really worth it. It was a little in this perspective of the relationship between effort and result that tipped the balance and I thought we had to find another solution. This wasn't being nice to anyone.

With regard to the involvement of external stakeholders in supporting the development of LISM, the MSTIE coordinators reveal different experiences in their contexts.

CEM001 mentions that despite the school's efforts, partnerships with public organisations are still not happening; on the other hand, he says that the partnerships established with private organisations for the development of individual transition plans have worked:

The school is already more open to inclusive education; people are more sensitised and everyone is practically working towards it. In the community, therefore, there.... We, at the school and at MSTIE, do our best to ensure that this happens, so that it is also reflected there. We try. But it's not happening yet. Some public organisations – I don't want to identify them here – should also be doing this work. I think that this work to promote partnerships and involvement shouldn't just be done by the school. It has to come from everyone. And it still isn't. As for the partnerships we've established for the development of individual transitions plans, more at the level of private organisations, I can say that we've had good experiences there. (CEM001)

CEM002 and CEM004 describe having good experiences with the participation of external stakeholders, whose partnerships they say existed before the LFIE:

With regard to the local authority, we highlight (...) initiatives to show films and some activities that are the responsibility of the council and to which the students are invited. (...) The students go out on visits a lot. On the other hand, there are other organisations with projects in which the students take part, community projects in which the students leave school and take part in these projects. These partnerships (...) have always been in place [before the LFIE]. They are renewed partnerships – every year they are renewed and they work. (CEM002)

These partnerships have always existed and continue to exist. And we get a good reception from the partner organisations for our students. Some cases could even be more difficult. For example, we have a lot of Roma students with Individual Transition Plan [this is one of the LISM and starts three years before finishing compulsory education] who are still welcomed by partner organisations. (...) We've had very open partners. (CEM004)

CEM005 emphasises the partnership that the school has with the local authority, describing it as a "really effective partnership" and says that although it existed before the LFIE, the new legislation has led to some changes in the direction of other lines of action by the local authority:

It's a really effective partnership [with the municipal authority], an effective partnership at various levels. (...) But the local authority itself, at a certain point, after the 54, created a Working Group for Inclusion – it felt the need to do so. (...) At specific times throughout the year, this Working Group for Inclusion has a specific programme that is combined with the school's activity plan and that allows the pupils in the group to have access to situations, experiences and opportunities that the school alone couldn't give them. (CEM005)

CEM003's report recognises the importance of networking and community involvement, and the existence of partnerships with the community based on the LFIE:

education being inclusive (...) only happens with networking. (...) This really has to be networking – it really depends on the community. And I think the community itself is also more sensitive to this. So I notice, even in terms of partnerships, in the old days [before the LFIE], maybe (...) there were no partnerships with the community, or maybe there was one. Nowadays we have a very large network of partnerships here. (CEM003)

The way in which MSTIE coordinators perceive and promote the participation of the educational community in the mobilisation of LISM highlights the non-linearity of the political process. Some coordinators always prioritise the participation of teachers and students, recognising the importance of actively including them in the decision-making process and valuing their perspectives. Others believe that participation should be conditioned to the profile of the student and the guardians, considering criteria such as ability and language, and situations have been identified in which the right to participation of some actors in the educational community, provided for in the legislative body (see Table 2 for an example of Law 116/2019 regarding the participation of guardians), is being disregarded. This diversity of perspectives reflects the complexity of institutional dynamics and the influence of middle management in defining inclusive practices.

It is important to reiterate that until 2018 there was no legal regulation responsible for promoting a more inclusive education for all students, with the MSTIE, created by the LFIE, being the structure responsible for sensitising the educational community to inclusive education (a), N° 8, Art. 12). In this context, the practices of these middle leaders, the coordinators of the MSTIE, take on even more importance because they are a reference for the entire educational community on how to promote more inclusive education than has been the case up to now.

The variety of experiences reported in the context of practice highlights the importance of the actions of MSTIE coordinators in how inclusive education policy is translated into different school contexts, which reveals the complexity of the policy process. This complexity emphasises the need for a review of the legislative body in order to ensure the participation of actors from the educational community, namely students, guardians and external stakeholders from public bodies.

Conclusion

While the context of influence captured the goals set by transnational organisations, emphasising broad participation and inclusivity, the analysis of the context of text production, on the other hand, reflected how these goals are translated into policy texts. The analysis of these contexts revealed that transnational organisations emphasised the importance of the active participation of students, guardians/parents and other external stakeholders in decision-making processes as a crucial element in strengthening the quality of inclusive education; however, the interpretations of some MSTIE coordinators suggest a more selective and limited participation in the context of practice. For example, while the documents advocate student participation in defining their educational trajectories, some of the practices reported indicate

that student participation is conditioned by their ability profile, with some coordinators considering that students with more pronounced difficulties may have only residual participation and others admitting that they may even be excluded from this process.

Similarly, although transnational organisations, in the context of influence and text production, stress the importance of the participation of parents and guardians in all aspects of their children's educational process, in the context of practice, this participation does not always occur or may occur very sporadically. This option is justified by the differences in the language of the members of the MSTIE and the guardians, an aspect that required an additional effort from the MSTIE in this communication.

The involvement of external actors, also highlighted in the contexts of influence and text production as a means of fostering more inclusive responses, varies across different school settings. While some MSTIE coordinators emphasise the growing effectiveness of renewed partnerships with both public and private entities, others report challenges in promoting these collaborations with public institutions. Even when such institutional partnerships exist, they often point to a lack of proactive participation from these entities.

From the point of view of the development of political processes, this article emphasises the complexity and non-linearity of the political process and highlights the importance of the actions of MSTIE coordinators in the development of the policy process. The interpretation of the coordinators promotes the participation of the educational community in their school contexts. In line with this, EASNIE (2014, 2021) points out that the work of these professionals is a decisive factor in building inclusive schools and UNESCO (2015) emphasises their importance in bridging the gap between policy and practice.

In turn, the analysis of the context of practice underlines that the development of more inclusive and democratic schools is contingent to a large extent on the action and authorship of institutional actors (Bolívar, 2012) who have "significant power to make (or not make) changes" (Cabral & Alves, 2018, p. 9).

The contexts of effects and of policy strategy are, thus, affected by the interconnection between policy formulation and implementation as changes in in the context of practice are not instigated without being affected by legal guidelines. In this sense, the degree of specification of these legal guidelines can enhance the recognition of the need to reorient practices in the context of policy strategy. To effectively address the challenges of inclusive education, it is essential to implement targeted strategies that support both policy and practices. The recommendations stemming from the analysis of the context of practice are expected to impinge the context of effects and, subsequently, reorient inclusive education in Portugal. These recommendations include:

- i. Legislative changes to ensure the active participation of guardians in the MSTIE, reinforcing their right to be involved in decision-making processes. This includes the mandatory requirement for the principal to inform guardians whenever their child is identified for assessment by the MSTIE regarding the need for LISM. Additionally, guardians must be granted the right to participate in decisions related to the mobilisation of LISM;

- ii. Policies should review the composition of the MSTIE to include the student as a mandatory participant. In cases where the MSTIE deems the student's participation unfeasible, this decision must be documented in the meeting minutes, with a clear explanation of the circumstances. Additionally, guardians should be promptly informed of the decision and the reasons for the student's non-participation;
- iii. National and institutional leaders should provide targeted training for public institutions in local communities (e.g., local councils, libraries) to strengthen their understanding of and contributions to fostering an inclusive school and community. This training should equip them with the knowledge and tools necessary to actively support inclusive education initiatives; and
- iv. Empowering MSTIE by providing comprehensive leadership training focused on inclusion. This initiative will enhance their ability to foster a socially just and inclusive school environment, benefiting all students and promoting equitable educational outcomes (EASNIE, 2021; Kılıçoğlu, 2018).

Limitations and Future Research

While the sample in this study is geographically representative, it may not fully reflect the diversity of practices and interpretations of inclusive policies in Portugal. Different regions, particularly coastal versus inland areas, may encounter distinct challenges and dynamics in implementing inclusive education policies, which could influence how MSTIE coordinators interpret and apply these directives. Additionally, the qualitative analysis derived from interviews and analysis of documents presents an inherent degree of subjectivity. Although the thematic analysis offered in-depth insights into the experiences and practices of MSTIE coordinators, future research could enhance its findings by expanding the sample size to include a broader range of schools and participants.

To further triangulate the findings and enhance the data, future studies should consider quantitative methods, such as surveys with a larger number of participants. This approach would provide a more comprehensive understanding of the implementation of inclusive education policies and allow for comparisons of results from different regions and contexts within Portugal.

Notes

¹ We adopted Formosinho, Fernandes and Lima's (1988) concept of the educational community, which includes students, teachers (including middle management, such as coordinators), guardians/parents and other organisations in the community (such as other schools, local authorities and associations).

² When referring to more vulnerable groups, we consider the classification of the OECD's Strength through Diversity project: special educational needs; immigrant and refugee background; ethnic groups, national minorities and indigenous background; giftedness; gender;

and sexual orientation and gender identity (LGBTQI+). This project was conceived by the OECD to "respond to the growing diversity that characterises education systems and the growing interest in designing and implementing inclusive education policies at national and international levels" (OECD, 2022).

³ This is an LISM (Article 10(c), Decree-Law 54/2018) that begins three years before the compulsory school age limit and is designed to promote the transition to post-school life and, where possible, to professional activity.

⁴ A description of each phase can be found in the article "Inclusive Education Systems: The Struggle for Equity and the Promotion of Autonomy in Portugal" (Carvalho, Cosme & Veiga, 2023b).

Acknowledgements

We especially thank the teachers (coordinators of Multidisciplinary Support Teams for Inclusive Education coordinators) who collaborated with this study, sharing with us their experiences and perceptions of the political process of inclusive education as actors and authors of this policy.

This research was supported by the Foundation for Science and Technology IP (FCT) and the European Social Fund [PhD studentship no. 2020.05522.BD]. It was also supported by FCT within the multi-year funding awarded to CIIE [grants no. UIDB/00167/2020 and UIDP/00167/2020].

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