



WP4

CASE STUDY



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Index

Partners	4
Description of the organisation	6
Motivation to participate in the assessment	8
Requirements for performing the assessment	10
Self-assessment process.....	12
Results and their classification	14
Five most important good practices from the self- assessment	15
Five most important suggestions for the self- assessment	17
The implementation of the measures	20
The impact of the results of the faculty and department	21
The client benefits	23
Future plans	25



Partners



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Case Study



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DESCRIPTION OF THE ORGANISATION

B1/PE do Monte is the only public primary school with pre-school education in Monte, Funchal, serving 120 students across 7 classes, including 2 pre-school and 5 primary classes. The school offers a welcoming and close-knit environment, making it a popular choice in the region.

Its mission is to provide excellent public education, promoting sustainable, inclusive learning that supports primary education completion and encourages further studies. Core values include responsibility, integrity, excellence, critical thinking, innovation, citizenship, and collaboration, with a focus on nurturing compassionate, entrepreneurial students committed to the common good.

The school emphasizes social inclusion, environmental sustainability, digital transformation, and democratic participation. It fosters educational excellence through collaborative practices and innovative projects, maintaining strong community ties and offering diverse opportunities tailored to students' needs.

EB1/PE do Monte actively participates in regional, national, and international projects, notably excelling in the Erasmus+ program, which enhances students' integration and personal development.

Students, aged 3 to 11, mostly come from the local area but also from countries like Ukraine, Venezuela, and the UK, contributing to the school's cultural diversity. Families are deeply involved in the school process, supporting projects focused on inclusion, innovation, and sustainability.

MOTIVATION TO PARTICIPATE IN THE ASSESSMENT

The school is dedicated to continuous improvement and sustainable development, recognizing the importance of self-assessment to reflect on its performance and identify areas for improvement. Since 2014/15, the use of the CAF (Common Assessment Framework) has provided a strong foundation for evaluating educational quality. However, the school has recently adopted the KNOWLO® framework, seeking a more simplified and holistic approach.

Participation in the Erasmus+ Excellence Boost project highlighted the value of KNOWLO® as a comprehensive and user-friendly tool for organizational evaluation. As Lima (2011) notes, "the use of a plurality of theoretical models of organizational analysis... for a critical understanding of the school as an educational organization" allows for more contextualized and meaningful assessments.

The school's self-assessment will focus on improving academic results and fostering innovation, especially in Portuguese and Mathematics, while evaluating the effectiveness of collaborative methodologies and the impact of technology. This process will also assess partnerships and the school's capacity to position itself as an innovative institution with an international outlook, reinforcing its commitment to excellence, to transparency, and adaptation to contemporary educational demands.



REQUIREMENTS FOR PERFORMING THE ASSESSMENT

B1/PE do Monte has implemented an institutional self-assessment process for the past ten years, in line with national legislation (Law No. 31/2002) that applies to Madeira Island. The school prepares a detailed long-term self-assessment plan every four years and an annual short-term plan outlining the requirements for the organizational self-assessment.

Key requirements for the self-assessment process include:

Appointment of the Self-Assessment Team: The school principal appointed a team of five professionals representing all areas of the school to coordinate the process, ensuring a diverse perspective.

Clarification of Self-Assessment Intentions: At the start of the academic year, the team defined the self-assessment objectives, focusing on continuous improvement and sustainable development, with input from the entire school community.

Communication and Involvement of the School Community: The process was widely publicized, encouraging participation from all stakeholders, including students, parents, staff, and regional representatives.

Definition of the Evaluation Paradigm: The team chose to apply both the Common Framework/CAF model and the KNOWLO® model, promoting sustainable solutions through community involvement.

Training Sessions and Clarification Meetings: Two training sessions on the KNOWLO® platform were held, and clarification meetings were organized throughout the year to guide the correct application of the platform in the self-assessment process.

Organization of Working Groups: Five working groups were formed, each led by a member of the Self-Assessment Team, to analyse specific school dimensions. As Thurler (1994) suggests, “(...) it is the members of the school who, in successive stages, define and adjust the contract, its purposes, requirements, effectiveness criteria, and ultimately organize their own continuous control of the progress made, negotiate, and make necessary adjustments(...)”. These requirements laid the foundation for a structured, participatory self-assessment process aimed at excellence and continuous improvement.

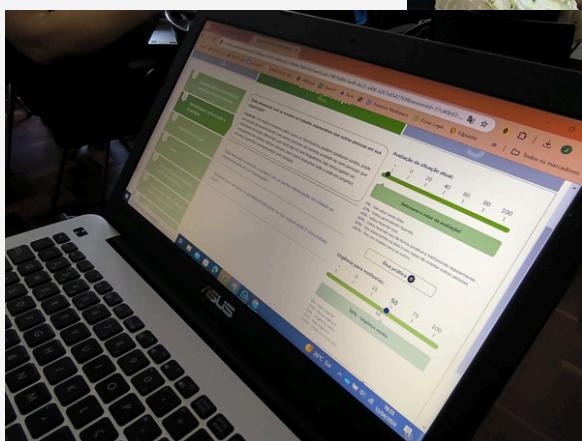
SELF-ASSESSMENT PROCESS

The self-assessment process at EB1/PE do Monte lasted three months, during which the working groups familiarized themselves with the Knowlo® platform. Before starting, all members attended a presentation about the platform. After forming the working groups, the coordinating team recommended that at least one member from each group conduct their own self-assessment to better understand the process, criteria, and dimensions.

The self-assessment began with the five groups dividing the criteria, with two groups assigned two criteria each. Meetings were held on Monday evenings, and Wednesday and Friday afternoons, allowing daily student activities to continue uninterrupted. While this method allowed flexibility, the three-month duration caused some fatigue due to the overlap with end-of-year tasks.

After the school year ended, the teachers had more time to complete the self-assessment. A key success factor was the leadership of the five groups, all of whom had experience in institutional self-assessment. The diversity of group members brought different perspectives, enriching the analysis and increasing objectivity and rigor.

Overall, the process was highly positive, both in terms of the clear results from the Knowlo® platform and the engagement of the entire school community, promoting a culture of continuous improvement at EB1/PE do Monte.



RESULTS AND THEIR CLASSIFICATION

The self-assessment team at EB1/PE do Monte worked diligently to ensure a rigorous and transparent evaluation process, aiming for excellence by referencing renowned organizations recognized for their Excellence Awards. The self-assessment has proven essential, providing valuable insights and reflections for all participants. It enables informed decisions that will positively impact the school's dynamics, helping to establish factors for improvement and enhance organizational effectiveness.

Upon completing the process, EB1/PE do Monte achieved an overall average score of 78% using the Knowlo® platform. The highest-scoring criteria were "Learning, Communication, and Cooperation" and "Results & Benchmarking", both at 84%. The lowest-scoring criterion was "Organisation and Its People" with 71%. This assessment will now guide the development of a plan for institutional improvement and change.



FIVE MOST IMPORTANT GOOD PRACTICES FROM THE SELF-ASSESSMENT

Among the most important good practices, we can mention:

a) Culture of Collaboration, Communication, and Strategic Alignment: The school fosters a collaborative environment where all staff work together towards the mission and vision. Teachers present annual strategic pedagogical plans to align with the school's goals, and a monitoring team supervises progress, ensuring cohesive action through effective collaboration and communication.

b) Strategic Training Plan for School Professionals: The school offers strong support for staff development, creating an annual training plan aligned with their needs. Teachers actively share best practices, and each staff member must participate in at least two training sessions per year, promoting continuous learning and professional growth.

c) Alignment with Client Needs and Strategic Focus:

The school ensures alignment with societal needs through continuous self-assessment, using strategies like satisfaction surveys and perception polls. External evaluations also provide insights to improve services and better serve students and guardians.

d) Institutional Self-Assessment Process Since 2014:

The school has implemented a regular self-assessment process based on the CAF model, monitoring key performance indicators such as pass/fail rates, academic progress, parental involvement, satisfaction, and resource quality. This helps adjust practices and improve overall performance.

e) Continuous Improvement Plan: The school uses self-assessment results to develop an annual improvement plan that addresses institutional weaknesses. This plan focuses on critical areas for development, ensuring that corrective actions align with the school's goals and priorities.

FIVE MOST IMPORTANT SUGGESTIONS FOR IMPROVEMENT FROM THE SELF- ASSESSMENT

Our average urgency score for improvement is 78.5%. During the self-assessment process, we observed that often the criterion with the lowest score does not necessarily reflect the priority for improvement. However, we recognize that criterion No. 3 - “Organization and its people” is the most urgent, as people are at the core of institutions. The success of any organization directly depends on the quality of interpersonal relationships and employee engagement. Investing in the development and well-being of individuals strengthens organizational culture, enhances collaboration, and fosters a positive work environment, which is essential for innovation and efficiency. Therefore, we consider these five suggestions fundamental for promoting significant improvements in our school:

a) Clarity of Organizational Processes: While the school promotes continuous improvement, there are opportunities to enhance the clarity and transparency of its processes for all staff. Developing stronger strategies to simplify and clarify these processes would ensure that everyone understands their roles and responsibilities more effectively.

b) Optimization of Digital Transition and Technological Empowerment: To fully realize the benefits of the digital transition, the school can better integrate technological tools and ensure all staff are trained to use task management platforms effectively. While new tools will improve transparency and access to information, ongoing training is essential to ensure consistent and efficient use.

c) Promotion of Creativity and Innovation Potential: The school values innovation but has the opportunity to further cultivate creativity by implementing a strategic plan for innovation. This could include initiatives like workshops, hackathons, and creative labs to encourage experimentation and new educational practices. Recognizing and rewarding innovative projects, along with continuous training in technology and innovation, would help maintain a dynamic, collaborative environment.

d) Support and Engagement of Staff: While the school values staff feedback and involvement in decision-making, there is room to further strengthen engagement. Implementing more frequent and detailed feedback surveys, creating formal dialogue channels, and holding regular follow-up meetings would ensure staff suggestions are more visibly incorporated. Development and recognition programs can also foster a more collaborative and motivated workforce.

e) Sustainable Development of Staff: Although the school already offers training and participates in the Erasmus+ Program, there is potential to further enhance sustainable staff development. A more structured and continuous training system could better address both individual and team needs. Personalized strategies, such as mentoring and specialized training, along with expanded international program participation, would support continuous professional growth for all staff



IMPLEMENTATION OF THE MEASURES

After conducting a SWOT analysis, assessing the strengths/good practices and areas for improvement resulting from the institutional self-assessment using the Knowlo® platform, we wanted to prioritize those improvement suggestions taking into account the specificities of the school. For this prioritization, we utilized the GUT matrix, a strategy that evaluates the Gravity, Urgency, and Trend of the identified areas for improvement, providing a more focused and holistic view of what we need to change in the school to achieve continuous improvement.

After applying the GUT matrix, we prioritized ten improvement actions to implement in the school over the next four academic years. Subsequently, we developed the School Educational Project (PEE), where, based on the prioritized improvement actions, we outlined the institutional objectives we want to achieve, taking into consideration the improvement priorities/actions. For each of the strategic objectives, we defined specific goals and performance indicators that would allow us to assess the reach and impact of the improvement actions to be implemented.

Alongside the PEE, we also prepared a Short-term and Long-term Institutional Improvement Plan, where we can concretely identify the improvement actions to be carried out, the period for their implementation, the individuals responsible for implementation, the monitoring and follow-up actions, and the evaluation of the improvements made.

THE IMPACT OF THE RESULTS OF THE FACULTY AND DEPARTMENT

(THE ORGANISATIONAL BENEFITS)

The self-assessment process had a significant positive impact on our school, reflecting on the people, the school climate, the teaching-learning processes, and the institutional and student outcomes. Through self-assessment, we strengthened the bonds among team members, fostering greater understanding and collaboration, which resulted in a more harmonious and motivating work environment.

This positive school climate facilitated the creation of a space where everyone felt heard and valued, encouraging active participation and commitment from staff in the institution's decision-making processes. Productive discussions helped identify clear responsibilities, which in turn improved the teaching-learning processes.

Moreover, the detailed analysis of the reports from the KNOWLO® platform allowed us to identify areas for improvement and implement effective change actions that enriched the educational experience. This structured approach not only enhanced the efficiency of internal processes but also had a direct effect on student outcomes, contributing to more effective and comprehensive learning. Thus, we view our school as a democratic and reflective organization focused on the effectiveness of processes, perceiving it as a living and dynamic organism capable of acting, interacting, and communicating to develop and learn to construct knowledge about itself – a reflective/learning school.

In conclusion, the school's self-assessment process has proven essential in driving our organization toward becoming a Smart Organization, in the pursuit of knowledge about itself to become an institution of excellence.

THE CLIENT BENEFITS

IMPACT ON STUDENTS AT THIS STAGE OF IMPLEMENTATION

The implementation of the school's self-assessment process generated significant benefits for students, teachers, and the educational community. For students, the learning environment became more organized and efficient, with teaching practices better aligned to their needs, providing a more motivating educational experience. Teachers were able to reflect on their practices and enhance their professional development, which improved coordination between subjects and the effectiveness of teaching strategies.

The educational community, in turn, benefited from strengthened dialogue between the school and families, promoting greater transparency in school decisions. This allowed the school to develop initiatives that were more suited to the community's needs, creating a more participatory environment committed to the quality of education.

IMPACT ON TEACHERS AT THIS STAGE OF IMPLEMENTATION

The EB1/PE do Monte, like all public schools in Portugal, is legally required (under Law No. 31/2002 and Regional Order No. 245/2014) to implement an annual self-assessment process, producing a final report every four years to be published and made available on the school's website and the website of the Regional Education Secretariat.

Thus, each year, we strive to improve and streamline this school self-assessment process through management tools and procedures that allow us to simplify our work.

The Knowlo® platform has played and will continue to play a fundamental role in simplifying this entire process. With Knowlo®, we can conduct a more effective and organized analysis, facilitating the identification of our strengths and areas for improvement.

The platform provides access to concrete data and valuable insights, helping us make more informed and precise decisions. Moreover, the use of Knowlo® involves the entire educational community - students, teachers, parents, and staff - promoting greater transparency and participation.

This way, we ensure that we are aligned with our educational and organizational objectives, creating a more cohesive teaching environment focused on the success of our students and our educational institution.

FUTURE PLANS

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