Pedagogical autonomy in the education systems of Portugal and Canada

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Abstract

The autonomy of schools has been widely discussed in literature, with many authors associating it with the centralized or decentralized structure of educational systems. In centralized systems, such as in Portugal, autonomy tends to be limited, as it is more characteristic of decentralized systems. Using interviews and content analysis, the researchers compared the degree of organizational autonomy between schools in a centralized system (Portugal) and a decentralized system (Canada) with the aim of analyzing and comparing the degree of pedagogical autonomy perceived by school administrators. In Portugal, there is some autonomy in both collective and individual decision-making by teachers, but it remains tied to the collective context. In Canada, autonomy is primarily granted to each teacher individually, allowing them a considerable degree of pedagogical freedom. This contrast reveals different approaches to school autonomy in both countries, reflecting the specificities of each educational model.
Keywords: School autonomy. Teacher autonomy. Education systems. Teaching.

A autonomia pedagógica nos sistemas educativos de Portugal e do Canadá

Resumo

A autonomia escolar tem sido amplamente discutida na literatura, com muitos autores associando-a à estrutura centralizada ou descentralizada dos sistemas educativos. Em sistemas centralizados, como o de Portugal, a autonomia tende a ser limitada, já que é mais característica de sistemas descentralizados. A partir

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de entrevistas e análise de conteúdo, os investigadores compararam o grau de autonomia organizacional entre as escolas de um sistema centralizado (Portugal) e de um descentralizado (Canadá) com o objetivo de analisar e comparar o grau de autonomia pedagógica percecionado pelos gestores escolares. Em Portugal, embora haja alguma autonomia na tomada de decisões tanto coletivas quanto individuais dos professores, ela ainda está vinculada ao contexto coletivo. No Canadá, por sua vez, a autonomia é atribuída principalmente aos professores, em termos individuais, permitindo-lhes um grau considerável de liberdade pedagógica. Este contraste revela diferentes abordagens à autonomia escolar nos dois países, refletindo as especificidades de cada modelo educativo.

Palavras-chave: Autonomia da escola. Autonomia dos professores. Sistemas educativos. Ensino.

La autonomía pedagógica en los sistemas educativos de Portugal y Canadá

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Resumen

La autonomía escolar ha sido ampliamente discutida en la literatura, con muchos autores asociándola con la estructura centralizada o descentralizada de los sistemas educativos. En los sistemas centralizados, como el de Portugal, la autonomía tiende a ser limitada, ya que es más característica de los sistemas descentralizados. Mediante entrevistas y análisis de contenido, los investigadores compararon el grado de autonomía organizacional entre escuelas en un sistema centralizado (Portugal) y un sistema descentralizado (Canadá) con el objetivo de analizar y comparar el grado de autonomía pedagógica percibida por los administradores escolares. En Portugal, existe cierta autonomía en la toma de decisiones tanto colectivas como individuales de los docentes, pero sigue estando vinculada al contexto colectivo. En Canadá, la autonomía se otorga principalmente a cada docente de manera individual, lo que les permite un grado considerable de libertad pedagógica. Este contraste revela diferentes

enfoques de la autonomía escolar en ambos países, reflejando las especificidades de cada modelo educativo.

Palabras clave: Autonomía escolar. Autonomía de los docentes. Sistemas educativos. Enseñanza.

Introduction

When analyzing the degree of autonomy given to the school, it is necessary to consider who within the school is given this decision-making power. Barroso (2013) speaks of a professional logic, relating to teachers, and an administrative logic, which concerns the principal and the school's bodies. In addition to these logics, there is the possibility of other logics coexisting in the school space, namely the logic of individual teacher autonomy, in contrast to collective teacher autonomy, which includes all the teachers in the school, the possibility of teachers, individually or collectively, having decision-making power on certain educational issues. It is considered that individual autonomy and collective autonomy lead to the existence of functional autonomy, as there are no standard ways of working or organizing the school. As it is a process resulting from the relationship and interaction of the different school actors and authors, it is accepted that there are constructed autonomy(ies), as described by Barroso (1996; 2009).

Associated with the concept of school autonomy is that of pedagogical autonomy. Our understanding is aligned with the definition of "pedagogical autonomy" presented by Morgado (2000), who, based on the legal-administrative aspect, as well as the reasoning of Fernandes (1992) and Sarmento (1993), states that this autonomy is the "[…] power to freely choose and/or define teaching methods and techniques, organizational structures of the teaching--learning process […] own bodies […]".] the power to freely choose and/or define teaching methods and techniques, the organizational structures of the teaching-learning process […] one's own teaching management bodies and their respective operating schemes and procedures […]" (Morgado, 2000, p. 50).

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With regard to decision-making power in this area, Pacheco (2008) identifies three levels. The first, of a political-administrative nature, is found in the central administration; the second, of management, in the school; and finally, that of implementation, in the context of the classroom. In this way, the author considers that the competences for making pedagogical decisions are not restricted to the central services of the Ministry of Education (ME), and that there is the possibility of exercising pedagogical autonomy in decision-making in schools and their classrooms. In addition, Pacheco (2008, p. 43-44) highlights the autonomy of the teacher by stating that their competences "[...] are always recognized, and it cannot be said that the teacher is conditioned in the space for building pedagogical autonomy". However, we understand that teachers can be conditioned by the existence of a central/regional program that can influence the exercise of their autonomy.

Nevertheless, and in line with Morgado and Martins (2008; 2011), it is in pedagogical autonomy that teachers can apply the competencies assigned to them in the teaching-learning process, i.e. the teacher has the power and freedom of didactic-pedagogical choice, which means the possibility of exercising autonomy in the pedagogical field, both individually and collectively.

The literature also states that teacher autonomy should be understood as the teacher's freedom, authority, scope for action or discretion in the different areas of professional activity (Parker, 2015). However, this autonomy can entail constraints. According to Skerritt (2020), a significant paradox of school autonomy is that it tends to restrict teachers' autonomy by subjecting them to greater monitoring of their work. While a teacher may see their decision-making power over their actions in the teaching and learning process increase, they may also lose freedom of action due to constant monitoring. However, autonomy is not synonymous with independence (Barroso 1996; 1997; 2005) because if we have autonomy, it is always from someone or something, because our actions are carried out in a context of dependencies and interdependencies and in a system of relationships (Barroso, 2005). In this line of thought, Fernandes (1992) considers that it is a concept of "dimensional nature", because autonomy can have different degrees, according to the level and scope of its application, in

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that it always implies dependence on someone or something, and the degree of freedom to be autonomous differs according to circumstances and contexts.

In the context of pedagogical autonomy, teachers are dependent on their hierarchical superiors, the principal of the educational establishment where they work. The idea that the head teacher is responsible for supervising teachers as part of their pedagogical practice at school is well established (L'Hostie; Boucher, 2004). In this sense, Danielson (2006, p. 6) states that many teachers are more knowledgeable about their work than the principals who supervise them - more knowledgeable about the subject they teach, the pedagogical approaches to use or the developmental characteristics of the students they teach. However, the same author admits that "It is true that all teaching environments share important characteristics, and that a careful and well-trained observer can recognize these characteristics (or their absence) in different contexts."

The organization and management of schools in Portugal has been dominated by the issue of autonomy. The successive publication of legal diplomas granting greater autonomy to schools has been accompanied by empirical research showing the contradiction between the legal norms and the concrete reality of schools' autonomous practices (Torres, 2004; Torres; Palhares, 2010). This debate revolves around the decentralization of the education system in a country traditionally considered to be centralized, such as Portugal.

For this reason, it was considered relevant to study the pedagogical autonomy of teachers, correlating it with the possibilities manifested in more or less decentralized education systems. Consequently, it is necessary to compare the Portuguese education system, which is more centralized, with another decentralized system, in order to understand the degree of pedagogical autonomy granted to teachers in both systems. In this context, the study looks at the education systems of Portugal and Ontario (Canada), one centralized and the other decentralized, respectively, to understand the real degree of pedagogical autonomy granted to the respective schools.

Within this framework, the researchers sought to understand the emergence of autonomous practices and their relationship with the respective context.

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They also sought to understand whether we should talk about "school autonomy" or "school autonomies" as a global concept, in which "collective" decision--making power can emerge from groups of actors in a school, or "individual" decision-making power, in which autonomy lies exclusively with a single person, regardless of the centralized or decentralized configuration of the system. It is thought that in schools in a centralized system, the collective may have more autonomy than in a decentralized system, just as it is questioned whether in a decentralized system there may be more individual autonomy than in a centralized one.

Methodology

The aim of this study is to analyze and compare the degree of pedagogical autonomy perceived by school managers in two different educational systems. To this end, a qualitative methodology with a comparative approach was adopted. Qualitative methodology "[…] represents a way of collecting and analyzing data, with a focus on understanding and an emphasis on meaning. […] Specifically, it is a method for examining phenomena, predominantly using 'words' as data" (Edmonds; Kennedy, 2017, p. 141-142). The comparative approach contributes to a better understanding of how autonomy is conceived in schools, in the context of their organization and management. From the outset, comparative studies have been aimed at "[…] understanding the dynamics of educational systems or aspects related to them through comparison" (Ferreira, 2008, p. 125).

The categories of analysis were drawn up according to the objectives of the study, namely to identify the authors who have decision-making power in defining teaching methods (*How do you view the selection of teaching methods to be used in the classroom?*) and to understand who defines the criteria for setting up groups of students for teaching purposes (*How do you evaluate the process of setting up groups of students/classes for teaching purposes?*).

The participants in this study consisted of two groups directly linked to school administration and management in the educational systems under analysis, namely school principals, chosen because of their central role in

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implementing educational policies and in the day-to-day management of schools, and educational supervisors, selected because of the support and monitoring of pedagogical practices they carry out in schools. The first group included fourteen school principals, coded from DP-A to DP-G in Portugal, and from DC-A to DC-G in Ontario, Canada. The second group, made up of two inspectors from the Inspectorate-General for Education and Science in Portugal (IP-A and IP-B) and two superintendents of schools in Ontario (SC-A and SC-B), was added to complement the understanding of the degree of pedagogical autonomy.

Data collection involved documentary research, focusing on relevant legal diplomas, and semi-structured interviews with individuals directly involved in school organization and management. Given the importance of the participants' perceptions of pedagogical autonomy, the semi-structured interview was used, allowing an analysis of the "[…] meaning that the actors attribute to their practices and the events with which they are confronted" (Quivy; Campenhoudt, 1995, p. 193).

After the interviews, the data was submitted to content analysis, which allowed for a rigorous, detailed and systematic interpretation of the data collected, identifying relevant patterns, themes, conjectures and meanings. The saturation theory of Glaser and Strauss (1967) was fundamental in this study.

Data analysis followed the principles of Glaser and Strauss' Grounded Theory (1967), which is suitable for developing theories based on qualitative data. Initially, in the open coding phase, the data was segmented into units of meaning, identifying categories and subcategories related to pedagogical autonomy. In axial coding, these categories were related to each other, building a more comprehensive theoretical structure. Finally, in selective coding, the central categories were refined and integrated into the emerging theory on pedagogical autonomy.

Theoretical saturation was achieved through theoretical sampling, continuing data collection until no new information or categories relevant to theoretical development emerged. During the analysis, the data was continuously compared and revised to identify saturation points and confirm the robustness of the emerging categories.

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Teaching methods

In the education systems under analysis, we found from the interviewees' speeches that teachers in both cases have decision-making power in defining the teaching methods to be adopted in the classroom to teach the syllabus, as can be seen in Table 1. Notwithstanding this domain, we noticed an indirect involvement of the ministries of education and local services, in the Canadian case, as well as the school itself, through the principal and/or groups of teachers, in the Portuguese case.

Table 1: Selection of teaching methods

Portugal	Canada
"[…] it's the teachers who decide on their method" (DP-D, 2017).	"[…] in the end, it depends on each teacher" (SC-B, 2017).
"[…] there is some coordination and […] a definition of the curriculum department's guidelines […] the last decision will always be the teacher's […] (DP-F, 2017). "[…] from the moment the teacher enters the classroom, they decide […]" (DP-A, 2017).	"[…] they are [methodologies] made by the individual teacher, but as principals, superintendents and system, we try to influence this, based on what we know from research is good [pedagogical] practice" (SC-B, 2017).
"[…] we don't have monitoring mechanisms, which are direct mechanisms, of what's going on in the classroom".	"When I visit schools, we go into the classrooms, I make observations and then I discuss it with the principal and vice-principal" (SC-B, 2017).

Source: the authors

The ministries of education in both countries do not intervene in the teaching practice of selecting teaching methods. In the Canadian case, the principals (DC-C, 2017; DC-D, 2017; DC-G, 2017) as well as the superintendents reported that the Ministry of Education (MoE) only participates indirectly in this selection, through the development, based on research into best pedagogical practices, of documents and teaching materials for teachers. However, according to the interviewees, their use is not compulsory. In the Portuguese case, none of the interviewees mentioned the teaching materials produced by

the Portuguese MoE, although they do exist, which shows the lack of relevance attributed to them by the interviewees.

At the level of regional education services, in the Portuguese case, and local services, in the Canadian case, the data revealed that there is no direct action in the selection of teaching methods. However, unlike in Portugal, the Canadian local services take downstream action by monitoring the methodologies used by teachers[1]. According to the interviewees, the *board* services periodically monitor teachers' actions in selecting methods through *walkthroughs* of classrooms by the superintendent and principal. According to some interviewees (DC-A, 2017; DC-E, 2017; DC-F, 2017), these "visits" to classrooms are due to the fact that the *board* sets "expectations" as well as "standards of practice". We understand from the speeches of those involved that the *board* develops support actions when it is clear that the teacher is not using what it considers to be the most appropriate methodology. Other interviewees (DC-A, 2017; DC-C, 2017; DC-E, 2017; DC-F , 2017) mentioned that the *board* produces teaching documents to support teachers and provides training on teaching methodologies (DC-A, 2017; DC-F, 2017; SC-B , 2017), as well as consultative support from *board* experts, whenever the principal or teacher considers it necessary (DC-A, 2017; DC-C, 2017; DC-E, 2017; DC-F , 2017). However, it was emphasized in the interviews that all these resources are not mandatory for teachers to use and that any obligation imposed by either the superintendent or the school principal constitutes a violation of *professional judgment*.

Professional judgment is a legal status granted to teachers by the Ontario Ministry of Education for the exercise of teaching performance. According to the ministry,

> Teachers will use their *professional judgment* to determine which specific expectations should be used to assess compliance with overall expectations, and which will be considered in instruction and assessment, but not necessarily evaluated (*Growing Success*, 2010, p. 38).

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Professional judgment is not only applicable to curriculum management and student assessment, as Allal (2012, p.1) states: "Teachers' *professional judgment* intervenes in all areas of their activity."

As far as the organization of Canadian teachers is concerned, we can see that there are no curriculum departments in elementary schools. Although they do exist in secondary schools, they meet informally and only when the principal wants some information from the teachers. Despite the (in)existence of curriculum departments, secondary school principals said that teachers work voluntarily and collaboratively, while elementary school principals pointed out that this type of work only takes place when teachers want it to, which we infer is rare. According to all the interviewees, following the agreements between the MoE and the teachers' union, teachers are considered to have *professional judgment* and, as such, cannot be questioned about the duties inherent in the profession. We can see from the speeches that this is the basis of all the autonomy that Canadian teachers enjoy on an individual level. This individual teacher autonomy manifests itself in not having to work collaboratively with their peers, in selecting teaching methods to use in the classroom, and in not having to provide any information about their decisions, as the principals explained. We believe that the individual pedagogical autonomy granted by the Canadian Ministry of Education explains the strong action of local authorities in controlling teaching practice and, rather than trying to "influence" teachers' decisions, as the interviewees said, they try to manipulate their choices towards what they consider to be the right thing to do, thus revealing the opposite of the trust placed in teachers by the ministry. This makes the degree of individual autonomy of the teachers visible, because any action by the *board*, whether through the superintendent or the principal, becomes ineffective and reveals their impotence. This situation becomes more evident when a superintendent (SC-A, 2017) mentioned that the responsibility for teaching practice lies with the school principal and the principals interviewed stressed their total lack of decision-making power in this matter.

In the Portuguese education system, we perceived a different context[2]. The interviewees did not mention any specific legal framework that the ministry

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grants to teachers, although that central service recognizes the technical and scientific autonomy of teachers, through the Statute of the Teaching Career (ECD). The subjects (DP-A, 2017; DP-B, 2017; DP-E, 2017; DP-F, 2017) reported that teachers articulate and plan methodological strategies in the curriculum department, subject group and between cycles (DP-B, 2017; DP-G, 2017), as well as in the pedagogical council (DP-A, 2017). However, they all peremptorily stated that, despite this coordination between peers, teachers have complete individual autonomy when it comes to implementing teaching methods in the classroom, as Pacheco (2008) has also found. This opinion is shared by the inspectors, one of whom (IP-A, 2017) emphasized the great autonomy that teachers enjoy when selecting teaching methods, when he said:

> [...] not even the subject group coordinators, let alone the department coordinators who are further away, are able, at the moment, to have a very objective and concrete action with the teaching methods that are applied directly by the teacher in the classroom (IP-B, 2017).

Classroom monitoring of teaching methods by the Portuguese principal is non-existent, unlike in the Canadian case. We believe that this situation stems from the principals' awareness that in the classroom, each "[...] teacher [...] decides [...] (DP-A, 2017), i.e. "[...] there are [...] no big rules, no big barriers [...] it's really up to each [teacher]" (DP-C, 2017). We can also assume that monitoring teaching methods is not a practice that is highly valued by principals, insofar as they consider that teaching methods are not valued by the teachers themselves either; some (DP-G, 2017; DP-F, 2017) stated that selecting methods is not their main concern. However, some of the principals interviewed explicitly or implicitly revealed that they were aware of the methods used by teachers; some (DP-A, 2017; DP-E, 2017; DP-F, 2017) said that they had teachers using traditional expository methods and others (DP-A, 2017; DP-E, 2017) said that there was a need to promote the use of innovative methods, by sharing practices or attending training sessions. However, despite having this knowledge, the principals' speeches were in the sense of not being involved in the decision to select teaching methods, which reveals a high degree of individual teacher autonomy.

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This lack of involvement in teachers' work on the part of Portuguese school principals, both at an individual level and at a coordination level, is highlighted in a study carried out by the Organization for Economic Cooperation and Development (OECD) (2018). This organization states that:

> School principals in Portugal show comparatively low involvement in certain types of leadership activities. Results from the OECD's TALIS study show that only 5% of these principals reported observing classroom instruction in 2013 (OECD, 2018).

In fact, throughout the interviews, we realized that the Portuguese principals (DP-B, 2017; DP-C, 2017; DP-D, 2017; DP-E, 2017; DP-F, 2017; DP-G , 2017) assumed a position of school manager rather than pedagogical leader, i.e. their speeches were along the lines that pedagogical issues belonged solely to teachers and not to school management. This pedagogical responsibility of the principal was only emphasized by the inspectors interviewed. In view of the OECD study and the data collected in this research, we can deduce that, in the Portuguese education system, the importance of the principal as a pedagogical leader is undervalued, unlike in the Canadian case.

Therefore, in the Portuguese context, we can assume that teachers have complete individual autonomy in selecting methods to use in the classroom, with no accountability, either to the principal or to the school bodies, namely the curriculum department, the subject group or the pedagogical council, as stated by Morgado and Martins (2008), Pacheco (2008) and Barroso (2013). Similarly, Canadian teachers have full individual pedagogical autonomy due to the ME's recognition of their *professional judgement.* This condition extends to all aspects of pedagogy, especially the selection of teaching methods, which reveals a high degree of autonomy, as presented by Allal (2012) and Wallin; Young and Levin (2006). Despite the monitoring carried out by the *board* (superintendent and principal), teachers are legally protected in their pedagogical decisions.

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Final considerations

This study shows that pedagogical autonomy is a principle recognized in the education systems of Portugal and Ontario, Canada, although its implementation varies according to institutional and organizational factors. In both contexts, legislation guarantees teachers the right to decide on teaching methodologies, but this autonomy is influenced by curriculum guidelines, school cultures and collaborative practices (Morgado, 2000, 2011; Morgado and Martins, 2008; Pacheco, 2008; Parker, 2015; Skerritt, 2020).

In Portugal, the Basic Law of the Education System (Lei de Bases do Sistema Educativo - LBSE) recognizes teachers' pedagogical autonomy, allowing them to adapt teaching to students' needs within the national curriculum framework. In Ontario, this autonomy is supported by agreements between the Ministry of Education and the unions, valuing teachers' *professional judgment* in the selection of pedagogical approaches (Allal, 2012, 2013; Wallin, Young and Levin, 2006).

In practice, pedagogical autonomy manifests itself in different ways. In Portugal, teachers are involved in curriculum planning and the definition of teaching strategies, promoting a balance between individual flexibility and collective coherence. However, within the classroom, teachers have autonomy in selecting teaching methods. In Ontario, teachers have a wide margin to choose teaching methods, as long as they are aligned with the provincial curriculum goals and the needs of the students (Skerritt, 2020; L'Hostie and Boucher, 2004).

Although pedagogical autonomy is formally guaranteed in both systems, we believe that its exercise is conditioned by multiple factors, including curricular requirements, assessment of results and institutional dynamics. In both contexts, teacher autonomy is not limited to the choice of pedagogical strategies, but also involves the ability to interpret and adapt the curriculum in innovative and effective ways.

Thus, strengthening pedagogical autonomy requires policies that promote favorable conditions for innovation and adaptation of teaching practices, while ensuring the quality of teaching. In both Portugal and Ontario, the

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challenge is to balance teachers' professional flexibility with the need for curricular alignment and educational coherence (Barroso, 1996, 1997, 2005; Danielson, 2006). Although teachers in Ontario enjoy a significantly higher degree of pedagogical autonomy than their Portuguese counterparts, school managers in both cases share a similar perception of the importance and limits of teachers' pedagogical autonomy.

Notes

1. Classroom *walkthroughs* are a tool for observing how teaching is developed in a learning environment and are carried out by superintendents, principals or other educational specialists.

2. Article 35(1) of the ECD; Article *5(c)*, Chapter II, Section I of the ECD.

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