

THE COMPETENCIES OF THE INSPECTORATE OF EDUCATION AND THE FUNCTIONS OF INSPECTORS IN PORTUGAL: FROM THE MONARCHY (1771/1772) TO THE PRESENT DAY (2023)

LAS FUNCIONES DE LA INSPECCIÓN DE EDUCACIÓN Y EL PAPEL DE LOS INSPECTORES EN PORTUGAL: DE LA MONARQUÍA (1771/1772) A NUESTROS DÍAS (2023)

Bercina Calçada.

– President of the Board of the Trade Union of Inspectors of Education, Portugal (bercinapereiracalcada@gmail.com)

Sérgio Mendonça.

– Chairman of the General Assembly of the Trade Union of Inspectors of Education, Portugal (sergiomendon@hotmail.com)

Abstract

The aim of this research was to analyse the historical evolution of the competences, organisation and attributions of the Inspectorate in Portugal (mainland), from the Monarchy (1771/1772) to the present day (2023), as well as the competences and functions of inspectors and its career. To carry out this

research, in addition to legal regulations and various bibliographies, unstructured interviews were carried out with inspectors.

The Inspectorate has developed its competences in line with the ideologies defended by the ruling power and in accordance with educational policies, from the monarchy (1771/1772) to the present day.

Inspectors have always been required to fulfil a wide range of competences and carry out a wide range of duties, directly linked to the functions imposed on the inspection of education, with many limitations on their technical autonomy.

In general, in the periods from 1771 to 1979, and from 1995 to 2009, the remuneration status was in line with the high levels of competence required to inspectors, with salaries being higher than the average salary for teachers. The current inspection career is not in line with the demands of the career, once progression and the evaluation system are clearly inadequate.

Keywords: *Inspection, inspectors, education, teaching, monarchy, republic.*

INTRODUCTION:

This research was the result of a bibliographical survey and review aimed at analysing the historical evolution of the competences and attributions of the Inspectorate in (mainland) Portugal, from the Monarchy (1771/1772) to the present day (2023), as well as the competences and functions of education inspectors over time and data relating to the inspection career.

By presenting the competences assigned to the Inspectorate over the time on study, whether it was integrated into other organisations or constituted an

"independent" service, the aim was to reflect on the demands placed on inspectors over time, in terms of working conditions, career and their pay status.

To carry out this research, in addition to the legal regulations and various bibliographic sources, unstructured interviews were conducted with inspectors (testimonies from five inspectors in post from the 1970s onwards).

1. HISTORICAL BACKGROUND

Education in Portugal until 1772 was essentially taken over by the church, initially with the intention of preparing new members of the clergy and later also to educate members of the bourgeoisie. From 1534 onwards, this role was mainly taken over by the Society of Jesus, and the Jesuits ended up playing a major role in the education of the Portuguese people (Carneiro, 2015).

Public education was never considered essential for the country, nor was literacy demanded by ordinary citizens. This ideology was maintained for a large part of the reign of King José I (1750 to 1777), who ignored the existence of centres of education that were the responsibility of private nobles or the Church and did not envisage the creation of a school network that would allow the Portuguese to be educated, giving them access to more and better education (Carneiro, 2015).

Another previous milestone, but one that is directly linked to the historical facts presented, refers to the appointment of Sebastião José de Carvalho e Melo, better known as the Marquês de Pombal, as Minister of the Kingdom during the reign of King José I, who banned the Jesuits from teaching and lecturing, as well as ordering the destruction of all the books they used and, consequently, the closure of their schools and their expulsion, leaving the country's education practically unanswered by those who wanted to be educated. Faced with this "vacuum", the state was pressurised to take on what had never concerned it before - public education (Carvalho & Joana, 2022).

In short, it can be said that in the period leading up to Pombal's regime, the "summits of power" accepted that schools existed, but they didn't create them, they didn't finance them, nor did they show any concern for their funding (Carneiro, 2015).

2. HISTORY OF THE INSPECTION OF EDUCATION

The development of this article is subdivided into two parts - Monarchy and Republic and then by the dates that were considered most relevant in the history of the Inspectorate of Education, admitting that other equally relevant dates could be set.

2.1 MONARCHY (1771 to 1910)

2.1.1. IN THE YEARS... 1771 AND 1772

We begin the chronology of the history of the Inspectorate of Education on the 4th of July 1771, when Marquês de Pombal handed over the direction of education to the Real Mesa Censória (Royal Board of Censors), which was also charged with inspecting all the colleges created for the study of primary education (Lume & Pintassilgo, 2002). The aim of this organisation's work was to find out about the state of the smaller schools (primary and secondary education) in Portugal so that the construction of a "national education system" could begin (Carvalho & Joana, 2022).

Thus, the first inspections were carried out by the Real Mesa Censória at the request of Marquês de Pombal, then minister of King José I. Given the characteristics of the work to be carried out, they could be classified as extraordinary inspections (Lume & Pintassilgo, 2002).

As a result of the work carried out by the Real Mesa Censória, namely with the "extraordinary inspections", public education was established in Portugal on the 6th of November 1772, which meant that schools had to be built, especially in the most important cities of the kingdom, teachers' vacancies had to be created and methods and subjects to be taught had to be defined, bearing in mind that a new direction for teaching had been determined, in an attempt to move away from the teaching and compendiums used by the Jesuits. It should also be noted that the Real Mesa Censória was entrusted with the development and responsibility of the country's Inspection Services (Carneiro, 2015; Carvalho & Joana, 2022).

Regarding the frequency and manner of the "visits", the criterion of "surprise" should be emphasised, in order to avoid the preparation of those who were visited, as well as the identification of the person responsible for the intervention, in an attempt to make the process as impartial as possible. A written report was required so that the general state of education could be known. This was an inspection whose main objective was to ensure that schools were "running smoothly", with some concern for guidance and support, problem prevention and training, as these inspections sought to provide a "prompt and effective remedy" for cases in which "defects occurred" (Carneiro, 2015).

To fulfil the mission, "inspectors" had to have the ability to report on the reality they encountered, relegating reflective, critical or even decision-making skills to a secondary role. This way of acting and the "profile" considered to be the most appropriate were indicators of the instrumentalization of inspectors and the inspection organisation, with functions limited to those issued by hierarchical superiors (Carvalho & Joana, 2022).

2.1.2. IN THE YEAR... 1836

In 1777, Queen Maria I, daughter of King José I, took power of the kingdom and removed the Minister, Marquês de Pombal, from the power.

As a relevant fact to point out during this period, in 1787, given the political, social, economic and cultural changes, the inspection services were reorganised and became part of the jurisdiction of the Real Mesa da Comissão Central sobre o Exame e Censura de Livros (Royal Board of the Central Commission on the Examination and Censorship of Books) (Carneiro, 2015; Carvalho & Joana, 2022).

In 1835, the reform of public education introduced a model for inspecting education that was centralised in the Ministry of Business of the Kingdom, where an educational supervisory body was created with inspection functions, the Conselho Superior de Instrução Pública (Superior Council of Public Instruction) (Carneiro, 2015; Justino & Almeida, 2016).

However, this council was abolished by the reform of 1836 and replaced by the Conselho Geral Diretor do Ensino Primário e Secundário (General Board of Primary and Secondary Education) and the inspection service would be the responsibility of the commissions that inspect primary education in the municipalities (Justino & Almeida, 2016).

With the reform of public education in 1844, the Conselho Superior de Instrução Pública was left in charge of the general inspection of all education, to be carried out, with regard to primary and secondary education, by study commissioners assisted by sub-delegates appointed from among skilled people in the district capitals and by county administrators under the authority of the civil governors (Carneiro, 2015; Justino & Almeida, 2016).

The 1844 education reform ended up separating the two essential functions of inspection between county administrators and study commissioners. Council administrators were essentially responsible for monitoring compliance with primary education regulations, what some authors call the "bureaucratic dimension of inspection". The commissioners of studies were responsible for assessing the state of teaching/teachers from the classroom, concluding with indications for improvement, which some authors call the "pedagogical dimension of inspection". (Justino & Almeida, 2016).

2.1.3. IN THE YEAR... 1870

The year 1870 was characterised as a turbulent period, the scene of various political conflicts. A revolution took place and, consequently, a new government was appointed, which created the Ministry of Public Instruction. There was a special concern for primary education, considering that it was there that Portugal's progress lay. There were two key concerns in relation to this cycle of studies: the creation of a qualified, stable and reasonably paid teaching staff and the creation of a permanent mechanism to supervise, boost and value it (Carneiro, 2003; Carvalho & Joana, 2022).

The aim of the 1870 reform was to deconcentrate the inspection service and establish an exclusive position for primary school inspectors, who were paid more than teachers, thus being the hierarchical superior over teachers. This reform concentrated the functions of bureaucratic and pedagogical control in the inspector and sub-inspector (Justino & Almeida, 2016; Carvalho & Joana, 2022).

2.1.4. IN THE YEAR... 1881

In July 1881, a regulation was approved which established the creation of an inspection system which, for the first time, created and provided vacancies for inspectors who would work with schools, in schools and for schools (Carvalho & Joana, 2022).

The country was divided into 12 school district circumscriptions, each of which had an inspector with exclusive functions. The school districts were subdivided into circles made up of two or more municipalities, each with a sub-inspector to assist the inspectors. The inspector was responsible for ensuring the essential functions of monitoring compliance with primary education regulations and assessing the state of teaching/teachers and "guiding and directing" them (Justino & Almeida, 2016).

In this way inspection had its own individuality, was permanent and professionalised. It could be said that the inspectorate that resulted from the

above organisation, situated between the top and the bottom of education, began to "demand" greater attention from both parts to school problems (Carneiro, 2003).

2.1.5. IN THE YEAR... 1892

In 1890, to give greater vitality and quality to education, the Ministry of Public Instruction and Fine Arts was created, responsible for maintaining the inspectors and sub-inspectors in the conditions they had had since then. However, in 1892, against a backdrop of political changes, it was abolished and, with it, the ordinary and permanent inspectorate was also abolished. As a result, the sub-inspectors became "attached" to other institutions, and were renamed "employees of the now extinct inspectorate", responsible for carrying out essentially administrative activities (Carneiro, 2003).

The situation in subsequent years remains unfavourable, as the inspectorate has no status, inspectors have no specific work and schools are inspected very occasionally.

To conclude, it should be noted that the permanent primary inspectorate, which was abolished in 1892, was re-established in 1894, but it was only in 1901 that it was organised definitively, with the creation of inspectors and sub-inspectors (Carvalho & Joana, 2022).

2.1.6. IN THE YEAR... 1901

In 1901, the inspection services were once again organised, gaining institutional status and becoming, by law, a regulatory body that valued and boosted the education system (Carneiro, 2003). The 1901 reform and subsequent regulations of 1902 once again deconcentrated the inspection service by dividing the country into three school districts, which comprised circles of approximately 100 official primary schools (Justino & Almeida, 2016).

Each school district was assigned a sub-inspector subordinate to the inspector of the respective district, responsible for assisting him and inspecting all official primary schools, without prior warning, at least twice a year. During the inspection visits to the schools, the (sub)inspector had to "guide and advise the teachers" (Justino & Almeida, 2016).

It was with the 1901 Reform that the independence of the inspectors was guaranteed, and they were paid much higher salaries than primary school teachers. Another aspect that contributed to consolidating the status of these professionals was the rigorous process of access to the profession, which made many male teachers interested. It should be noted that female teachers continued to be barred from entering the profession (Carvalho & Joana, 2022).

2.1.7. IN THE YEAR... 1905

In 1905, it was decided that candidates who had exclusively passed a public examination held for the purpose or who had been recruited from among the then primary sub-inspectors and primary school teachers who had been teaching for at least five years with good and effective service and who had belonged to the now extinct inspectorate would be appointed to the school boards. Portugal thus had an inspectorate for primary education only (Carneiro, 2003).

Inspectors were required to be critical, active and reflective individuals who could make sense of the complexity of the school's organisational dynamics, since they were considered to be the hierarchical superiors closest to the teachers and possessed a set of competences that gave them local, regional and national recognition and notoriety, which continued with the establishment of the Republic (Carvalho & Joana, 2022).

2.2 REPUBLIC (1910 TO 2023)

From 1900, following the British ultimatum, the egalitarian ideals of the Republic began to be systematically disseminated. As a result of the assassination of the King and Crown Prince on 1 February 1908, the political situation deteriorated.

It was in Lisbon on the 4th of October 1910 that the revolution began, and the fighting lasted until the morning of the following day. The monarchist forces were unable to counter the republican forces and on the morning of 5th October 1910 the Republic was proclaimed from the balcony of Lisbon City Hall (Carneiro, 2008).

2.2.1. IN THE YEAR... 1911

With the implementation of the Republic, the inspectorate experienced its golden age, as republican propaganda focused on combating illiteracy and criticising the monarchical school system (Lume & Pintassilgo, 2002). The professional position of the inspectors changed, with increased prestige and respect from the educational community (Carvalho & Joana, 2022). In 1911, a new set of regulations determined that the inspectors' work would cover both the pedagogical component and the control of primary education and established the salaries to be awarded to each inspector, according to the category they belonged to in the system. The salary they earned, compared to that of other officials in the same professional area, shows that their remuneration status was high (Carneiro, 2008).

Meanwhile, in 1913, the Ministry of Public Instruction was created, with the inspection of primary education coming under the Directorate-General for Primary Instruction and that of secondary schools under the responsibility of an Inspection Council operating under the Directorate-General for Secondary Education (Lume & Pintassilgo, 2002; Carneiro, 2008).

2.2.2. IN THE YEAR... 1917

The year 1917 was marked by the entry of women into the inspection system. The entry of women into the inspection system had always been a demand, considering that there were already female teachers at all levels of education. However, until the revolution of 25th April 1974, the body of inspectors continued to be made up of a majority of men. The images and representations that were constructed were consequently masculine, resulting in a highly masculinised profession (Carvalho & Joana, 2022).

2.2.3. IN THE YEAR... 1933

During the dictatorship, in 1933, there was a definitive separation between the administration and management of primary education and the pedagogical guidance and inspection services, with primary and secondary education being integrated into the respective General Directorates and the inspection of private education establishments being integrated in the General Inspection of Private Education, an organisation created for this purpose (Lume & Pintassilgo, 2002; Carneiro, 2014).

In 1936, some measures considered urgent were introduced in primary education, namely it was established that disciplinary inspectors and guidance counsellors would be freely chosen by the Minister, who could replace them at any time, thus being able to deal with teaching problems in the manner intended by the regime (Lume & Pintassilgo, 2002).

Decree-Law no. 408/71, of 27 September, created the Directorate-General for Primary Education, on which the Primary Education Inspectorate now depended, while secondary education remained part of the Directorate-General for Secondary Education and private education remained part of the Inspectorate-General for Private Education (Carneiro, 2014).

2.2.4 REVOLUTION OF 25 APRIL 1974

In the transition from dictatorship to democracy, the Primary Education Inspection and Guidance services were one of the most contested sectors of the Directorate-General for Basic Education, considering that the image that existed was of a merely supervisory inspection. The reality was that the number of inspectors was still insufficient, making the inspection merely a check that teachers' actions complied with the bureaucratically defined rules (Lume & Pintassilgo, 2002).

After the 25th April, there was a clear concern to move towards a new philosophy of inspection, with pedagogical determinants being seen as fundamental. The aim was to progressively dilute disciplinary action with pedagogical action.

2.2.5. IN THE YEAR... 1979

The massification of education that we saw in the 1970s forced a reorganisation and redefinition of the central structures of the Ministry of Education, separating the executive functions from the control functions that, until then, had been the responsibility of the General Education Directorates (Carvalho & Joana, 2022).

Decree-Law no. 540/79, of 31st December, separated the inspection and control functions that were the responsibility of the General Education Directorates, leaving them with the design and execution functions and passing the control functions on to the General Education Inspectorate, created by the same law. The General Education Inspectorate, endowed with administrative autonomy, became a pedagogical, administrative, financial and disciplinary control service in the non-higher education subsystem (Lume & Pintassilgo, 2002).

According to these regulations, this body was responsible for verifying and ensuring compliance with the legal provisions and guidelines defined by the higher education authorities; informing the competent authorities about the implementation and monitoring of the differences and anomalies found,

proposing the measures considered appropriate to overcome it and to do the necessary disciplinary action.

2.2.6 CREATION OF THE TEACHING INSPECTORS' UNION – 1988

On the 28th of June 1988, the Constituent Commission was elected and it was responsible to prepare all the legal documents to create the union.

On the 24th September 1988, the Constituent Assembly approved the union's constitution and statutes. The union was then called Sindicato dos Inspetores do Ensino (SIE). On the 15th November 1988, the Statutes of the Trade Union were published in the Labour and Employment Bulletin.

In April 2003, at a General Assembly meeting, the new statutes were approved and the union was renamed Sindicato dos Inspetores da Educação e do Ensino (SIEE), thus including inspectors from the autonomous regions of Madeira and of the Azores. The new statutes were published in the Bulletin of Labour and Employment on the 22nd October 2003.

2.2.7. IN THE YEAR... 1991

Decree-Law 304/91 of 16 August renamed the Inspeção-Geral do Ensino (IGE) to Inspeção-Geral da Educação, with functions in the pedagogical and disciplinary areas of the non-higher education subsystem and the administrative-financial area of the entire educational system.

Its general remit includes monitoring the pedagogical quality of pre-school and out-of-school education and basic and secondary education, monitoring the administrative and financial efficiency of the entire education system and the overall and qualitative assessment of education and teaching establishments.

In 1993, through Decree-Law no. 140/93, 26th April, the IGE's functions included monitoring and supervising the pedagogical and technical aspects of pre-school, basic, secondary and higher education, as well as controlling the pedagogical and technical quality of pre-school, basic and secondary education,

as well as private and cooperative higher education. Control of the administrative and financial efficiency of all establishments and services integrated into the education system is maintained, and it is noted that within the scope of public higher education, IGE is responsible for verifying compliance with the legal provisions applicable to the tuition fees system and school social protection.

2.2.8. IN THE YEAR... 1995

In 1995, a new organic law for the IGE was published (Decree-Law no. 271/95, 23rd October), which stated in the preamble that, in order to Inspeção-Geral de Educação "(...) pursue its main function of evaluating and supervising the implementation of school education, it must have a more complete definition of its competences, an appropriate organisational structure and a staff statute that respects the principle of autonomy that must govern the exercise of inspection activity."

Law no. 18/96, 20th June, amended Decree-Law no. 271/95, 23rd October, introducing organic changes and changes to the inspection career.

The senior inspection career (special regime career) was structured into four categories: inspector, principal inspector, senior inspector and principal senior inspector. Progression was automatic, considering only the module of three years' service with a rating of not less than Good, with the inspector moving up to the next step/index, while promotion depended on a competition, as it implied a change of category.

In short, there was a significant revalorisation of the career of education inspectors, and in addition to the indices set for each category, a risk supplement (20% of basic pay) was added.

2.2.9. INTEGRATED ASSESSMENT – 1999

With the publication of Decree-Law no. 115-A/98, 4th May (the school autonomy regime), schools were required to manage themselves in a situation of

greater autonomy, resulting in greater decentralisation of the education system, leading to an increase in the powers of school management bodies, which resulted in the development of evaluation and accountability processes.

The IGE had to be considered an organisational evaluation service, whose fundamental task should be to evaluate the performance of educational organisations: schools, structures and services. It was thus a question of "evaluating the quality of educational policies (...), which implies a new approach to the question of the legality of procedures, to the extent that compliance with rules and regulations, while remaining an important issue in terms of performance evaluation, tends to cease to be the central concern of inspection work in the field" (IGE, 1998: 6). Thus, in 1999, the "Integrated Evaluation of Schools" inspection project was created.

It is important to note that since inspectors are obliged to take on duties and responsibilities of different natures, some more linked to bureaucratic and supervisory processes, others of a more corporate and pedagogical nature, an inspection body is required to stimulate and encourage the adoption of improvement processes, that is ethically committed, critical, motivated and innovative (Carvalho & Joana, 2022).

The end of integrated evaluation is marked by the publication of Law 31/2002, 20th December, which approves the system for evaluating non-higher education, removing IGE from the role of being responsible for the external evaluation of schools (Calçada & Mendonça, 2022).

2.2.10. EXTERNAL EVALUATION OF SCHOOLS – 2007

In 2007, the IGE resumed the external evaluation of schools, since it was necessary to sign the school development and autonomy contracts, which had to be articulated with the external evaluation. It should be noted that this project will continue to be part of inspection activities until 2023 (Calçada & Mendonça, 2022).

2.2.11. IN THE YEAR... 2009

In 2009 (with effect from 2010), in accordance with Decree-Law no. 170/2009, 3rd August, the career of education inspectors was changed to a single category (inspector) with 14 positions or steps, requiring 10 points in performance evaluations to change position.

The new career structure is extremely penalising for education inspectors, and it could even be said that there has been a big step backwards and probably the worst pay situation in the entire history of education inspection.

2.2.12. IN THE YEAR... 2012

The Decree-Law no. 125/2011, 29th December, determined that the Ministry of Education and the Ministry of Science and Higher Education merged, and the Regulatory Decree no. 15/2012, 27th January, determined that the two inspectorates (Inspeção-Geral da Ciência e Ensino Superior and Inspeção-Geral da Educação) were merged, giving rise to the current Inspeção-Geral da Educação e Ciência (IGEC) (Calçada & Mendonça, 2022).

2.2.13. IN THE YEAR... 2023

Currently, the framework legislation is still the one from 2011 and 2012, and IGEC continues to work in the education system, specifically in pre-school, primary, secondary and higher education establishments, as well as in the Science, Technology and Higher Education and Education services.

It is responsible for monitoring, controlling, auditing and evaluating, in technical-pedagogical and administrative-financial terms, the activities of pre-school, school and out-of-school education, schools and educational establishments in the public, private and co-operative, and solidarity networks, as

well as establishments and courses that teach Portuguese abroad. It is also responsible for inspecting and auditing higher education establishments.

CONCLUSION

The history of education inspection in Portugal predates the establishment of public education in Portugal in 1772, with inspection services being part of the Mesa Real Censória. From 1870 onwards, the inspectorate was always part of the Ministry that oversaw education, whether or not it depended on General Directorates, and in 1979 it began to have a structure similar to the one that exists today, in which all areas and levels of intervention are aggregated.

The inspectors' functions in the time span under study were associated with inspection and control, with some concerns about the need for support and accompaniment, i.e. the functions carried out by the inspection services were centred on compliance control (bureaucratic dimension) and the quality (improvement and enhancement) of teaching, assessed through teacher performance (pedagogical dimension), and more recently they have progressively moved towards interventions to assess the quality of the public education service.

Until 2009, inspectors had salaries that were considered adequate to fulfil their duties, given the degree of responsibility and the demands of the work carried out, compared to the salaries of teachers.

From 2009 to the present day (2023), what we see is that, given the requirement to accumulate 10 points for progression to the next pay grade, for around 75 per cent of inspectors (those who only received a mention of adequate performance throughout the period in question), inspectors at the start of their careers will only be able to reach the highest pay grade after 110 years of effective service.

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