

IMPACT OF IN-SERVICE TRAINING ON THE EVALUATION OF EDUCATION INSPECTORS IN PORTUGAL

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Abstract

This research is an empirical study, based on documentary analysis and unstructured interviews with inspectors, and its objectives were: to find out about the impact of the change in the evaluation system for education inspectors had and has on career progression; to demonstrate the impact that the change in career, associated with the change in the evaluation system, has and will have on the professional life of education inspectors in Portugal; to analyse the in-service

training offered by the General Inspectorate of Education and Science to inspectors and the impact that training has on the performance of workers.

In methodological terms, all the legislation relating to the career and evaluation system of education inspectors was analysed, as well as the collection and processing of data relating to the progression/promotion, evaluation and in-service training of inspectors. Unstructured interviews with inspectors were used to validate data or to explain and clarify certain aspects.

The change in the career of inspectors to a unicategorical career, coupled with the new evaluation system, with quotas for "Relevant" and "Excellent" evaluations, has resulted in a drastic reduction in the number of progressions/changes in salary position, with the result that many inspectors are unable to reach the last salary position(s) until they retire, contrary to what would have happened if they had remained in the teaching career.

The in-service training provided by the General Inspectorate of Education and Science and other training attended at the initiative of inspectors has no direct impact on career progression.

Keywords: *Inspectors, in-service training, professional career, evaluation.*

1. INTRODUCTION

The evaluation system for education inspectors in Portugal is common to the general careers of the Portuguese Public Administration. From 1983 to 2004, the so-called "Civil Service Classification", based on the assessment of competences, which did not stipulate a quota system for the highest qualitative marks, allowed inspectors, as long as they were rated at least "Good", to progress automatically every 3 years, or to be promoted every 3 years by competitive examination (for the latter two categories, 3 years with Very Good or 5 years with Good were required).

Progression was automatic, with only the module of three years' service with a rating of no less than Good being taken into account, with the inspector moving up to the next step/index, while promotion depended on a competition, as it implied a change of category.

It is important to clarify the above, because according to Decree-Law 271/95 of 23 October, the education inspection career (special regime career) was structured into four categories: inspector, principal inspector, senior inspector and senior principal inspector (article 26). Appointment to the above-mentioned categories was organised as follows:

a) For inspector: from among trainees who have passed their traineeship with a classification of not less than Good (14 points, on a scale from 1 to 20);

b) For principal inspector: by competitive examination, from among inspectors with at least three years in the category and a classification of not less than Good.

c) For senior inspector: from among principal inspectors, with a degree, with at least three years' service in the category and a classification of more than Good

or five years with a classification of Good, and by means of a competition and public tests, which consisted of an appraisal and discussion of the candidate's professional CV.

d) For senior principal inspector: by competitive examination, from among senior inspectors with at least three years' service in the category and a classification of more than Good or five years with a classification of Good.

To summarise, the career structure is presented, with the four categories and their respective pay scales (indices), the basis of which was a value set by government decree for index 100, plus a risk supplement (20% of basic pay).

Table 1 - Categories and respective ranks of the inspection career prior to 2009.

Category	Grades					
	1	2	3	4	5	6
Senior principal inspector	700	720	760	820		
Senior inspector	600	620	650	680	720	
Principal inspector	500	520	550	580	610	640
Inspector	440	450	465	485	510	535

In order to be promoted to a higher category, the inspector had to present his CV, so training was very relevant when analysing the inspector's CV, although its weighting was not legally stipulated, and it was left to the discretion of the selection board.

From 2005 onwards, performance assessment began to be carried out through the "Integrated Public Administration Performance Assessment System" (SIADAP), whose assessment parameters were results (objectives), competences and attitudes (which were no longer part of the assessment from 2007 onwards). Performance assessment is now subject to a quota system, with a maximum percentage of 25 per cent being set for final qualitative assessments of "Relevant Performance" and, of these, 5 per cent for recognition of "Excellent Performance". The final qualitative assessment, which until 2024 took place every two years, is converted into a points system where, until 2022, the mention of "Adequate Performance" corresponded to a total of 2 points, "Relevant Performance" to 4 points and "Excellent Performance" to 6 points.

According to the new amendment to the appraisal system (Decree-Law no. 12/2024 of 10 January), the appraisal of inspectors will be annual from 2025 onwards, and the quota system will be maintained, with the percentages being defined as follows: 30 per cent for "Very Good" mentions (formerly "Relevant") and, of these, 10 per cent for recognition of "Excellent Performance" and 30 per cent for qualitative mentions of "Good" (new appraisal level). The final qualitative assessment will continue to be converted using a points system, in which a "Regular" (formerly "Adequate") performance rating corresponds to 1 point, "Good" to 1.5 points, "Very Good" to 2 points and "Excellent" to 3 points.

In 2009 (with effect from 2010), in accordance with Decree-Law 170/2009 of 3 August, the career path of education inspectors was changed to a single category (inspector) with 14 pay grades, requiring 10 points in performance evaluations to change pay grade (according to Decree-Law 12/2024 of 10 January, 8 points will be required), and there is no competitive process to change to the new level. In the same statute, to cover the higher pay rates, two complementary pay positions were created, which can only be accessed by inspectors who at the time of the transition to the new career were already part of the previous education inspection career.

Regarding the in-service training of education inspectors, it should be noted that one of SIADAP's objectives is to identify the training and professional development needs that are appropriate for improving workers' performance. However, there is no explicit positive differentiation when it comes to attending in-service training, only the implicit mention of its contribution to improving the worker's competences.

On the contrary, the Career Statute for Kindergarten Teachers and Primary and Secondary School Teachers, approved by Decree-Law no. 139-A/90, of 28 April, with subsequent amendments, in particular those introduced by Decree-Law no. 15/2007, of 19 January, and Decree-Law no. 41/2012, of 21 February, states in its article 37 that teachers must attend continuous training or specialised training courses in order to progress in their careers. Article 37 states that for career progression, one of the mandatory requirements is that teachers who are effectively working in non-higher education establishments attend continuous training or specialised training courses for at least half of the assessment cycle, for a total of no less than 25 hours in the 5th level of the teaching career and 50 hours in the remaining levels of the teaching career.

About in-service training in Portugal, it is important to mention its relevance to other careers. The Labour Code, approved by Law no. 7/2009, of 12 February, with subsequent amendments, states in Article 130 that the employer must promote the development and adaptation of the employee's qualifications, ensuring that each employee has the individual right to training, through a minimum number of hours of training per year, through actions developed in the company or the granting of time to attend training on the employee's initiative, and that the qualifications acquired by the employees must be recognised and valued (points a), b) and d) of number 1).

The law goes even further, stipulating a minimum number of hours of continuous training per year (40 hours) to be made available by the employer, with the time used for training counting as normal working time.

In the context of the Portuguese Public Administration, Decree-Law 86-A/2016 of 29 December defines the system of in-service training in the Public Administration, highlighting the importance of the qualification of its workers and managers, in order to respond to the demands arising from their respective missions, duties and competences, as well as to develop innovation and change management skills, contributing to the efficiency, effectiveness and quality of the services provided to citizens and companies (article 4, points a), b) and c)).

It should be noted that the legislation mentions that continuous training aims to promote the updating and personal and professional development of workers (Article 8, number 1), but there is no mention of the influence or direct impact of continuous training on workers' career progression.

It should also be noted that there is no stipulation on the number of hours to be made available by the public employer, there is only the indication that the worker must be given access to in-service training (article 11). However, there is the possibility for employees to attend up to 100 hours of training per year (Article 16, number 2), on their own initiative and with the costs of the training to be attended being their responsibility, provided that they request it and with the authorisation of the department, given the relevance of the training to the employee's performance and to the organisation, with these hours corresponding to the actual performance of duties, when the training is carried out during working hours.

2. RESULTS

2.1. IGEC inspectors' careers and salaries

A comparative analysis of the career of inspectors before 2009 and the new career, in terms of the length of the career and the respective rates of pay, particularly about the number of years needed to reach the top of the career, is presented on the following graphs.

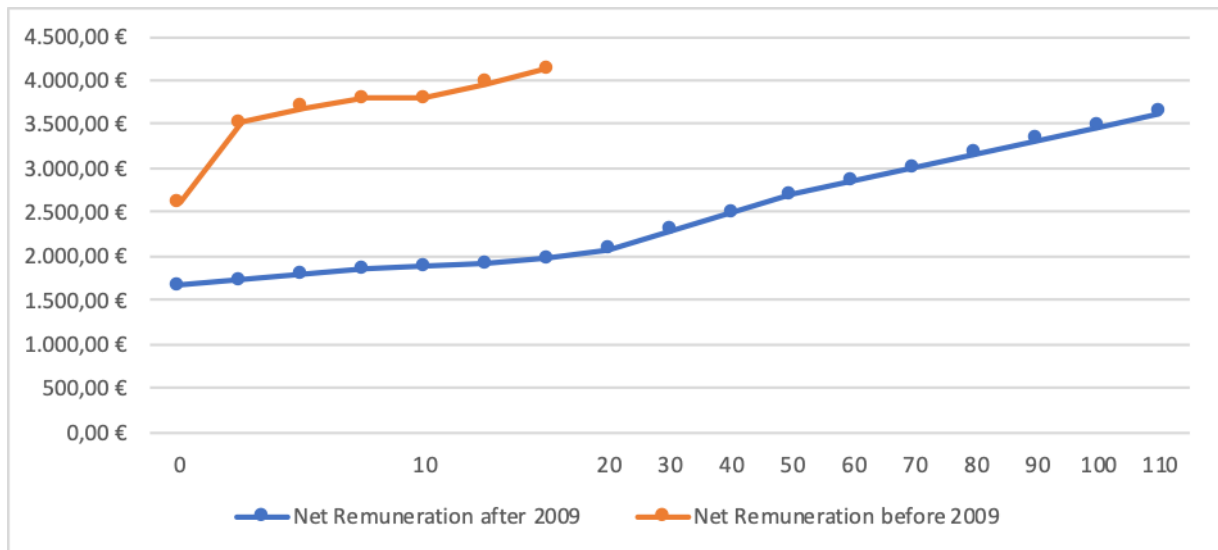


Figure 1 - Comparison of pay levels between inspectors' careers before and after 2009.

As you can see, according to the career structure prior to 2009, at the end of 18 years inspectors would theoretically be able to reach the maximum pay grade. For this to happen, at the end of every three years the respective competition for promotion to the next category would have to occur.

Between 2009 and 2023, we realised that, given the requirement to accumulate 10 points for progression to the next pay grade, around 75% of inspectors recruited after 2009 (those who only received a mention of adequate performance throughout the period in question) would only be able to reach the highest career grade after 110 years of effective service.

Given the publication of Decree-Law 12/2024 of 10 January, the reality is as shown in the following graph.

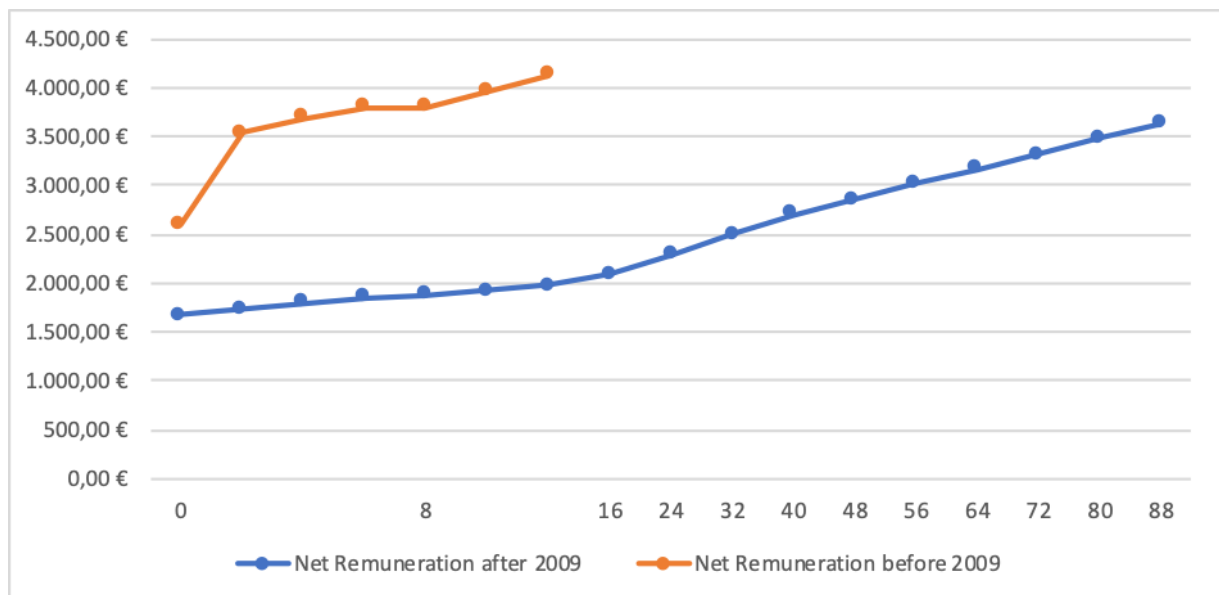


Figure 2 - Comparison of pay levels between inspectors' careers before 2009 and after 2025.

From 2025 onwards, according to the graph above, it will take 88 years to reach the highest career rating for 40 per cent of inspectors (those who have only obtained a "Fair" performance rating throughout the period in question), while for the remaining 60 per cent it may vary between 30 years (if the rating is always "Excellent") and 87 years (if they obtain at least a "Good" rating in two years).

It should be remembered that the career of education inspector is a second career, considering that to enter the career you need to be a teacher and preferably have at least five years' teaching experience, as well as having a permanent position as a teacher in a school, and in practice it is almost impossible to have teachers with only five years' teaching experience and already have a permanent position as a teacher in a school.

Thus, with the age set in Portugal for access to retirement, 66 years and 4 months, and with the assumptions indicated above, it is easy to conclude that it is impossible for any inspector to reach the top of their career, starting it at the bottom.

In terms of changes in position between 2004 and 2021, IGEC's social balance sheets and activity plans and reports were analysed and the following graph was drawn up, which shows, among the total number of inspectors, those who changed their pay position by promotion and progression (before 2009) or by compulsory change (after 2009 - when they acquire 10 points in the performance evaluation) and also pay changes by exceptional merit or management option.

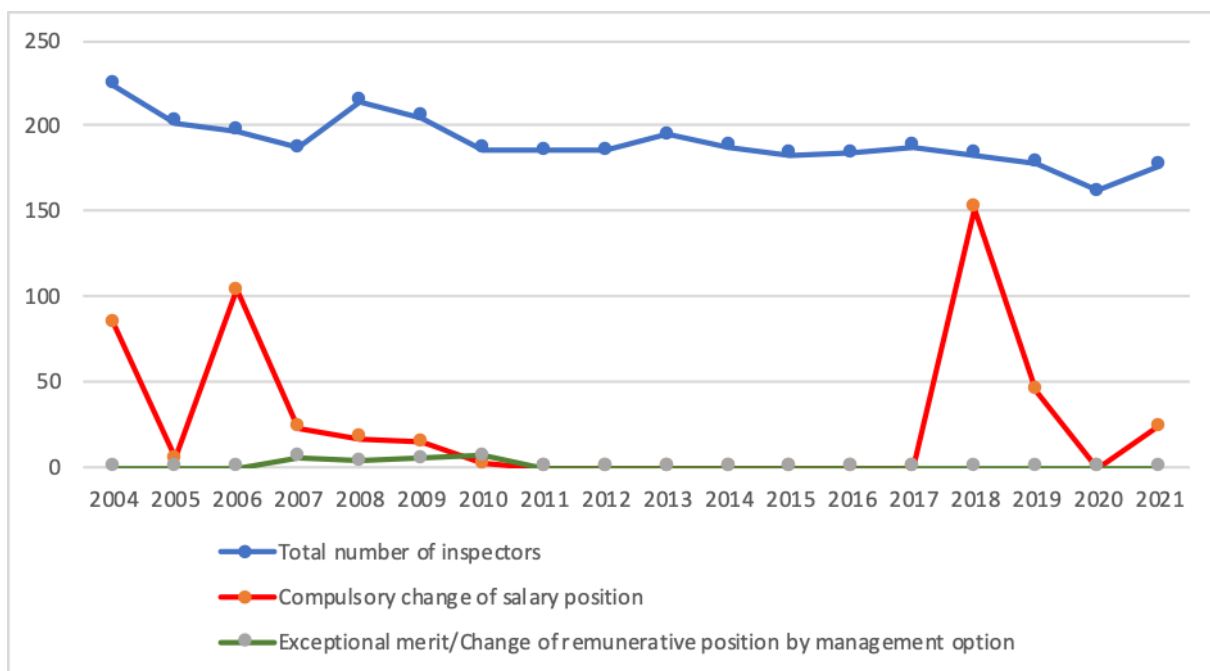


Figure 3 - Changes in salary positioning between 2004 and 2021.

As it can be seen, the number of inspectors fell between 2004 (224 inspectors) and 2007 (187 inspectors), considering the retirements that took place during this time gap, and increased in 2008 (214 inspectors), due to the existence of an entry competition that increased the number of staff. Between 2008 and 2013, the number of inspectors fell again, taking into account retirements and the lack of entry competitions for inspectors. In 2013 there was an increase from 185 to 195 inspectors, considering the existence of inspector mobilisations and new

staff joining. Between 2013 and 2020 there was a substantial reduction in the number of inspectors, with the minimum number of inspectors in the time gap being analysed reaching 162 in 2020. We will see a slight increase in inspectors again in 2021, considering the opening of a new entry competition.

With regard to promotions, progressions and/or compulsory changes in position, it can be seen that between 2004 and 2010 there were a total of 250 changes in remuneration under the inspection career prior to the entry into force of Decree-Law 170/2009 of 3 August (84 in 2004; 5 in 2005; 104 in 2006; 23 in 2007; 17 in 2008; 15 in 2009 and 2 in 2010), with no changes in remuneration between 2011 and 2017 (the period when public administration careers were frozen). Under the legislation, i.e. under the law published in 2009, there were 221 changes in pay (152 in 2018; 45 in 2019 and 24 in 2021), reflecting the unfreezing of the career in 2018, which justifies the figures presented in 2018 and 2019, and the biennial appraisal cycles, which justify the lack of any change in 2020.

It should be remembered that the existence of access competitions for the categories of principal inspector, senior inspector and senior principal inspector until 2009 implied much more significant changes in remuneration compared to the changes in remuneration rates under Decree-Law 170/2009 of 3 August.

To conclude the analysis of the graph, it should be emphasised that in 19 years only 22 changes in position were considered due to exceptional merit or management options, with these changes only occurring between 2007 and 2010 (6 in 2007; 4 in 2008; 5 in 2009; 7 in 2010).

2.2. Age structure of IGEC inspectors

We now move on to analyse the age range of the inspectors of the General Inspectorate of Education and Science, with reference to the year 2021, where seven age groups have been created - 35 to 39 years; 40 to 44 years; 45 to 49 years; 50 to 54 years; 55 to 59 years; 60 to 64 years and 65 to 70 years. It should be noted that the retirement age in Portugal is currently 66 years and 4 months (in 2021 it was 66 years and 6 months).

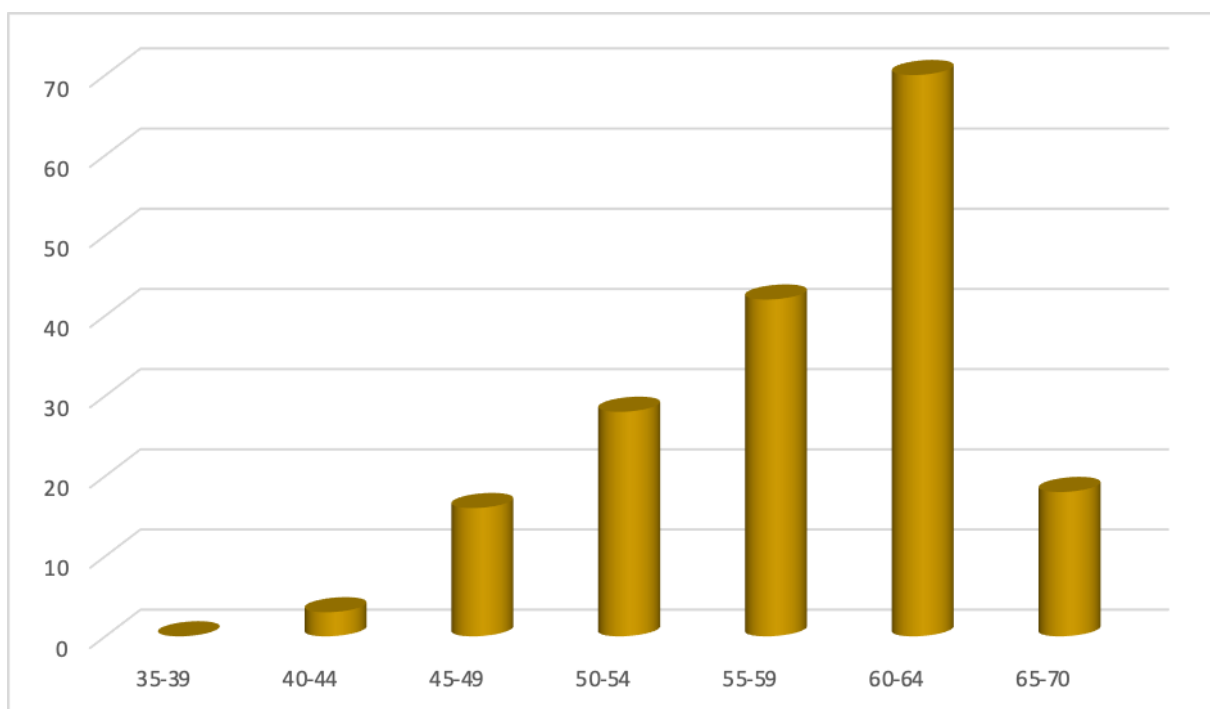


Figure 4 - Inspectors' age groups, with reference to 2021.

When we look at the distribution of IGEC inspectors by age group, the situation becomes unsustainable, since around 10% of inspectors have already reached the legal retirement age, almost 40% are less than five years away from retiring and around 24% will retire in the next ten years, making a total of 74% of inspectors. This means that, from 2031, IGEC will only have around 26 per cent of the inspectors it currently has, if no new inspectors join in the meantime.

It should be remembered that the education inspection career is a second career, which explains the lack of staff in the first class indicated (35 to 39) and in lower age classes.

2.3. In-service training for IGEC inspectors

As mentioned above, there is no legal requirement for in-service training for the career of education inspectors, unlike for the teaching career. Nor is there any legal stipulation regarding the number of hours that Public Administration bodies in Portugal must make available to their employees. In the context of evaluating the performance of inspectors, the training indicated by the evaluators is not binding, neither on the part of the department to make the agreed in-service training available, nor on the part of the employee to attend it if it is not provided by the organisation to which he or she depends.

In view of the above, we are faced with a very complex situation in which, regardless of whether or not the inspector attends in-service training, he will be able to progress in his career. It can always be argued that failure to attend training will naturally have an impact on the inspector's performance and, consequently, on his performance appraisal.

Based on IGEC's management instruments, the number of training hours attended by inspectors from 2004 to 2021 was surveyed, and the training hours taken into account included in-service training and self-training. According to the interviews with inspectors (a total of 10 inspectors), the in-service training considered by IGEC includes the preparatory training that is given as part of the inspection projects to be implemented, i.e. the presentation and preparation that is carried out by the services, aimed at the inspectors who will be in charge of the inspection intervention. It was not possible to segregate the hours of in-service

training directly linked to preparing for the implementation of inspection projects from the hours of training of a more general nature and of great relevance to the inspectors' performance.

As mentioned above, after surveying the total number of training hours attended by inspectors, an average of the number of training hours per inspector was calculated, compared to the total number of IGEC inspectors in each year.

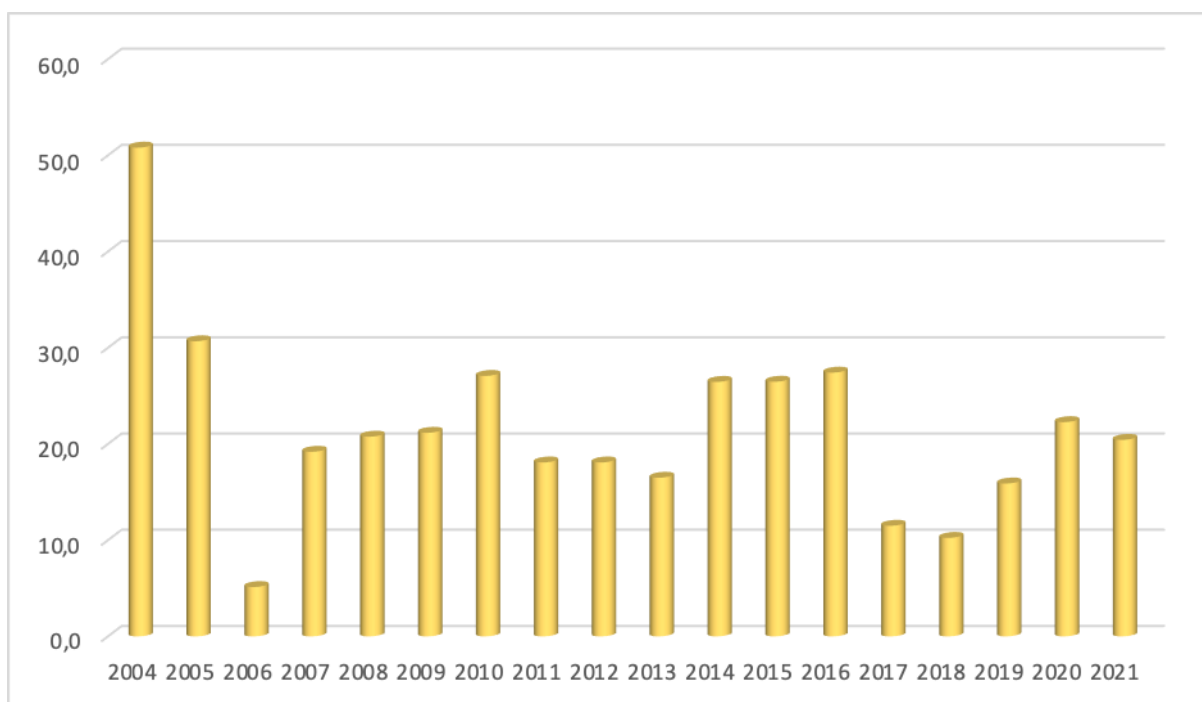


Figure 5 - Average hours of in-service training per IGEC inspector.

As it can be seen, with the exception of 2004, when the average number of training hours per inspector was around 50 hours, in the remaining years the number of training hours was always equal to or less than 30 hours, with 2006 (average of 5.1 hours), 2018 (average of 10.2 hours) and 2017 (average of 11.5 hours) standing out as the years in which the average number of training hours was lowest.

The situation described above is mainly due to the fact that there is no legal requirement to set a number of hours necessary for career progression or to make it compulsory for the department to provide a minimum number of hours of training for its employees.

To conclude, it should be noted that a proposal for an organic law for the General Inspectorate of Education and Science has been drawn up by the Trade Union of Education Inspectors and presented to the Ministry of Education, which includes a change to the performance assessment system, as well as a reformulation of the career of education inspectors in Portugal.

3. CONCLUSIONS

Since 2010, with the change to a career with a single category (inspector), in addition to the "freeze" determined for all Public Administration careers until the end of 2017, associated with the new evaluation system (with conversion of qualitative evaluation into points), with quotas for "Relevant" and "Excellent" performance, there is a drastic reduction in the number of progressions/changes in salary position, with a huge impact on the professional life of education inspectors in Portugal, considering that many inspectors will not be able to reach the last salary position(s) until they retire, unlike if they had remained in the teaching career.

The average age of education inspectors is very high, and within seven years (until 2031) around 74 per cent of the inspectors currently working for IGEC will retire. So there is an urgent need for new inspectors, and this will require significant changes to the conditions for entry and to the career itself, in order to make it more attractive and fairer.

The in-service training provided by the General Inspectorate of Education and Science was mainly in the context of clarification/training sessions relating to the implementation of inspection projects, with the average number of hours of in-service training varying greatly. It should also be noted that the training attended by inspectors has no direct impact on career progression, with the exception (due to the entry into force of Decree-Law no. 51/2022 of 26 July) of successful attendance of academic training leading to a doctorate degree.

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