

The Documentation for the School System Evaluation and the Teachers Professional Development: A University-school Collaborative Research in Italy

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Abstract

The continuous professional development of the teacher (CDP) has long been considered a prerequisite for the career and also for economic progress. CDP must be compared to standards which also make it possible to construct validation systems for the teachers' skills in progress. The issue of teaching professionalism emerges also in the Italian legislative debate. We outline the research "The continuous professional development of the teacher: from the Improvement Plan to the appraisal", conducted with a group of 33 schools in Southern Italy, the University of Bari and *Unione Cattolica Italiana Insegnanti Medi* (UCIIM, teachers' association). The research project investigated the documentation of practices (connected with school's self-evaluation, teacher evaluation and appraisal procedures) to improve the quality of teaching and to develop teacher professionalism. Three phases of research training occurred: a) The first phase involved a specific document analysis of "Rav" and "PdM" (acronyms for Self-Assessment Report - *Rapporto di Auto-Valutazione* - and Improvement Plan - *Piano di Miglioramento*). These documents were presented to the teaching staff and served as the primary materials for self-evaluation and decision-making. b) In the second phase, referred to as "professional development," the skills audit and standards were introduced and collaboratively developed with the teachers. These documents formed the foundation of a teacher's professional development program. c) The third phase was dedicated to "merit appraisal." It focused on selecting and analyzing the best appraisal sheets, which were considered the primary documents for assessing merit and promoting teachers. The school staff involved over 300 people, including teachers and principals. The results of the study underlined: the impact of the documentary practices introduced by school evaluation system on professional development; the importance of university-school collaboration supporting school-based assessment and teachers' professional development, shifting from a top-down orientation to more teacher self-regulating initiatives; the methodological-educational choice of principals as teachers' tutors.

Keywords: appraisal, documentation, evaluation, teacher professionalism, quality.

Документация для оценки школьной системы и профессионального развития учителей: Совместное исследование университета и школы в Италии

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Аннотация

Непрерывное профессиональное развитие учителей (НПР) давно считается необходимым условием успешной карьеры и экономического прогресса. НПР должно быть сопоставлено со стандартами, на которых основаны системы проверки навыков учителей. Вопрос профессионализма учителей обсуждается в Италии на законодательном уровне. В настоящей статье представлены результаты исследования «Непрерывное профессиональное развитие учителей: от плана совершенствования до оценивания», проведенного в 33 школах на юге Италии, совместно с университетом Бари и итальянским Союзом учителей (УСПИМ). Исследовательский проект был направлен на изучение документации, связанной с самооценкой школы, процедурами оценки и аттестации учителей. Такая работа необходима для повышения качества преподавания и профессионального роста учителей. Исследовательская работа проходила в три этапа. На первом этапе был проведен анализ документов Rav и PdM (Отчет о самооценке и План совершенствования). Эти документы были представлены преподавательскому составу и послужили основными материалами для самооценки и принятия решений. На втором этапе – «Профессиональное развитие» – были разработаны совместно с преподавателями стандарты и процедура проверки (аудита) навыков. Эти документы легли в основу программы профессионального развития учителей. Третий этап состоял из оценки достижений. Он был посвящен отбору и анализу лучших аттестационных листов, которые являются основными документами для оценки заслуг и продвижения учителей. В исследовании приняли участие более 300 человек, включая учителей и директоров школ. Результаты исследования показали влияние практики документирования, введенной в систему школьного оценивания, на профессиональное развитие; важность сотрудничества университета и школы в поддержке школьного оценивания и профессионального развития учителей; методико-педагогический выбор директоров школ в качестве наставников учителей.

Ключевые слова: аттестация, документация, оценка, профессионализм преподавателя, качество.

Introduction

The continuous professional development of the teacher (CDP) has long been considered a prerequisite for career progress, for economic growth and for enhancing student learning. Teachers rated as *excellent* (Perla, 2011) can aspire to receive additional compensation, i.e. in monetary forms or in the form of rewards by taking on different roles, such as *middle management*. Enhancing the teacher and his/her teaching action boosts the teacher empowerment and, consequently, the institutional role of the school. At the heart of the scholastic effectiveness the teacher-factor and those of context and process should be considered.

CDP must be compared to standards which, by constituting institutionally recognized goals of competence, also make it possible to construct validation systems for the teachers' skills *in progress* and to open up to different profiling hypotheses of the teaching function.

According to Wyatt-Smith and Looney (2016), the recent intensified interest in the classroom practice of teachers is attested by generating and disseminating codified representations of teachers' work: these *codes*, often expressed as standards, have become part of contemporary education policy landscapes (Australian Institute for Teaching and School Leadership, 2011; General Teaching Council for Scotland, 2012; General Teaching Council for Northern Ireland, 2007).

National representations of teachers' professional standards and codes of practice reflect particular perspectives on teachers and their work, understandings of teaching and of the nature and purpose of standards and their function for the profession and the public (Clarke & Moore 2013; Conway & Murphy, 2013; Darling-Hammond, 1996; Kleinhenz & Ingvarson 2007; Sachs 2003; Sergiovanni & Starrat, 2002). As Clarke and Moore (2013) observed, codes and standards provide a common professional language for teachers, teacher candidates, and other education professionals, containing a public and accessible statement of the complexity and difficulty of teachers' work. While Shulman (1986) argues that the complexity and idiosyncratic nature of teachers' work resist standardisation, it is however necessary to solve that problem of making public what is held as "guild" knowledge (Kleinhenz & Ingvarson, 2007; Sadler, 1989). Wyatt-Smith and Looney (2016) highlight that, "the standards come to serve as a public formulation of guild knowledge" (p. 809) and represent an opportunity for teachers to present evidence of their work (Kleinhenz & Ingvarson, 2007).

The issue of teaching professionalism emerges also in the Italian legislative debate (DPR 275/1999, MIUR 2014; Legs.107/2015): articulated through skills and professional standards, this professionalism needs to begin with the initial teachers training and must be developed through continuous training courses. In Italy, the merit appraisal procedure foresees the discretion of the Committee of evaluation and a principal. They operate within suitable macro-areas in the law (Legs. 107): 1) *quality of teaching*; 2) *innovation*; 3) *organization*. We outline the research entitled "The continuous professional development of the teacher: from the Improvement Plan to the appraisal" (Perla, 2019), conducted with 33 schools in Southern Italy, the Educational Department of University of Bari and UCIIM (teachers' association) involving 308 participants. The research project investigated the documentation of practices (connected with school's self-evaluation, teacher evaluation and appraisal procedures) to improve the quality of school and enhance the professionalism of the teacher. *Documenting* is considered one of the main skills expected of the best teachers, a distinctive and peculiar trait of their profession.

This study seeks to answer the following research questions:

1. What is the relation of the documentary practices introduced by school evaluation system (teacher self-evaluation documents, teacher appraisal procedures, teachers'

professional standards and codes of practice, self-assessment reports and improvement projects) with initial teaching practice and professional development from teachers' perspective?

2. How does university-school collaboration support school-based assessment and teachers' entire professional development shifting from a top-down orientation to more teacher self-regulating initiatives?

Learning to write the improvement: the documentation for the appraisal

The organization of an effective document management and archiving system for school data can play a decisive role in the improvement of teaching (Frisch, 2010; Perla & Schiavone 2014).

The term 'documentation' comes from Latin *docēre* - to inform, to teach "what shows or represents a fact" (Ferraris, 2010, p. 280). It is a complex *'taking-action'*, including *activities, operations, [and] works* that have to do with some fundamental dimensions of the practice: the historical narration and, therefore, the collection of what can be important for the reconstruction of an inherent "memory" to a specific area; the juridical proof, namely the writing that has the legal and socially relevant value of the testimony (Ferraris, 2010); and the repository of information / training productions (present in digital or analog media, and in various codes and formats) that makes knowledge progress through research. This latter dimension has probably had more development in the 20th century due to its function of effective response to the demand for informative documentation emerging from a rapidly developing scientific and technological reality such as ours.

In this field, the theme of documentation intersects with that of educational improvement through self-evaluation and the professional development of teachers. Indeed, good documentation makes it possible to clarify the strategic objectives that allow the development of the school and the implementation of performance management.

Regardless of the theoretical reasons that support its value, research on self-assessment / evaluation documentation models for school improvement is still in its infancy, at least in Italy. As Bottani (2012) argues, this depends on a science—of the evaluation of school systems and of teachers—still young and imperfect.

The study on scientific documentation should therefore support the actions that are still beyond consolidation: it requires a practical reason and a focused look, rather than on the learning outcomes or top-down models derived from the school, on the situated actions of the teacher.

Evaluation cannot be based only on neo-positivistic paradigms of "Teacher Effectiveness": "it is also an art, it stimulates intuition, diplomatic skills, cunning and other gifts that have little to do with science" (Bottani, 2012, pp. 13-14). Never as in reference to the documentation for the evaluation of the school, Bottani's words get right to the core issue: being trained on the documentation for the evaluation makes the teacher more aware not only of the students' learning processes (learning outcomes), but also of the usefulness of one's own didactic intervention strategies (teaching processes).

Why should schools take on the burden of the complex system of self-evaluation / evaluation? What is the "meaning" of the entire procedure? The sense should be sought, above all, in one objective: to continue to recognize the high social value of the teacher—that for many years teaching has been considered a semi-profession—in order to equip schools with agile, understandable, rational systems of evaluation/appraisal of teachers, with shared procedures from school communities.

Improvement is possible, but it requires the conscious co-participation of the teaching staff in the evaluation procedures of the system, equipping the schools with tools that support the self-management of the performance cycle, and focusing the evaluation processes on the “added value”¹ of a school.

If the extended sharing on the “sense” of evaluation – regulatory, reflective, reporting – is lacking, the culture of evaluation will be difficult to achieve in the Italian context (Ribolzi, 2009, pp. 29-32).

The teachers and principals of Italian schools have well grasped the value of knowing how to document and that this competence should be acquired through education in a specific knowledge, made up of documentation prototypes, archives, dedicated and situated actions. For this to occur, it is necessary to think about the integration of information-documentation as a “research discipline” (Frisch, 2014) in all its complexity and within a curriculum for the training of teachers and principals.

The integration of information-documentation as a “research discipline” would be based on two assumptions: no knowledge of/on self-evaluation/evaluation can ignore the recognition of the role of the practical knowledge (Altet & Vinatier, 2008; Magnoler, 2012; Perla, 2010;) in the construction of the relative practical knowledge; any self-assessment-evaluation document cannot fail to pass the testing of practices.

The critical issues detected through previous research on the drawing up of the Rav (Self-evaluation Report) and the PdM (Improvement Plan) (Perla & Vinci 2016)²—the two main self-assessment documents used in Italian schools—have therefore urged the hypothesis of possibility of co-constructing the most agile documentation tools that could be adopted by the schools involved.

The documentation for improvement is outlined, therefore, as a real semiotic system: it is characterized, on one hand, as a logical instrument of interpretation reading, elaboration of a system of signs, which uses the various levels of language of semiotics; on the other hand, as a means of producing signs, that are data, information and building architectures of signs – in other words, ‘knowledge’.

The method of research training: "adaptive cycle" of quality starting from the documentation of the practices. Self-assessment, professional development, appraisal of merit

The research *‘The continuous professional development of the teacher: from the Improvement Plan to the appraisal’* supports the case that *self-assessment/evaluative competence* is, above all, a skill to know how to *well document* (Frisch, 2014; Perla, 2012; 2014; 2017).

¹ The ‘added value’ means the contribution that a school offers to students’ learning, measured from a given level. Though the school cannot get under control all the contextual and individual factors of learning, it is responsible for the quality of the educational and organizational actions. In this way, when evaluating the effectiveness of a school, it is necessary to consider the “school effect”, namely, to distinguish the effect of the student’s personal and context characteristics (i.e., the level of incoming prerequisites) and the school processes ones, at the organizational and didactics levels.

² Rav (Rapporto di Autovalutazione - *Self-assessment report*) and PdM (Piano di Miglioramento - *Improvement Plans*) are the main documents of school self-evaluation. The first has several dimensions and provides a representation of the school through an analysis of its functioning and forms the basis for identifying the development priorities towards which the improvement plan should orient. The second designs the development priorities in order to carry out the improvement interventions also with the collaboration of INDIRE, Universities, experts, professional and cultural associations. In the PdM the activities are planned and a final report is produced.

The prototype³, given to teachers and principals, is the “adaptive cycle” of quality, profiled on the characteristics of the school context, in which the improvement procedures are strongly linked to the teacher’s professional development, *per se* an adaptive variable.

No improvement is possible without the related investment in professional development. The prototype is characterized by its ‘adaptivity’, for both initial training and professional development: in other words, it ‘fixes’ a structure, beyond the contextual conditions in which it is applied. The dynamic matrix of prototype (see figure 1) explains the improvement links and articulates them in three fundamental interacting ‘poles’: the self-assessment processes, the professional development processes and the merit appraisal actions.

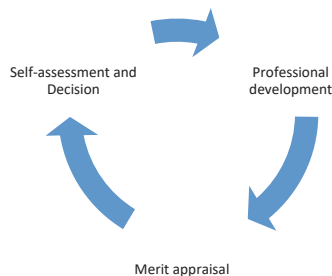


Figure 1. Prototype of the ‘adaptive cycle’ of school quality

Source: Perla, L. (2019). *Valutare per valorizzare. La documentazione per il miglioramento di scuola, insegnanti, studenti (Evaluate to Enhance. Documentation for School, Teachers, and Students Improvement)*

The research training process was integrated into the prototype in three distinct phases: a) The first phase involved analyzing specific documents (Rav and PdM, acronyms for Self-Assessment Report - *Rapporto di Auto-Valutazione* - and Improvement Plan - *Piano di Miglioramento*). These documents were presented to the teaching staff, serving as the primary materials for their self-assessment and decision-making. b) In the second phase, referred to as “professional development,” the skills audit and standards were introduced and collaboratively developed with the teachers. These documents formed the foundation of a teacher’s professional development program. c) The third phase was dedicated to “merit appraisal.” It focused on selecting and analyzing the best appraisal sheets, which were considered the primary documents for assessing merit and promoting teachers.

On one hand, the prototype served a purely formative function, as suggested by Astolfi’s model ‘circular process of conceptualization’ (“*processus bouclé de conceptualization*” (Astolfi, 1992, p. 71) that show teachers in the training the connections among *information/knowledge/know-how*, regarding the evaluation; on the other, the documentary writings served the role of artefacts for conceptualization.

Aims and methodological protocol

The schools involved in the research voluntarily participated by formal expression of interest and agreement. Each participating school included 5-10 teachers, according

³ The prototype is a ‘form of documentation that follows the action, it constitutes a structured report, and performs a regulatory function, of ideal type to conform the action itself. The term *prototype* clearly highlights the salient features of this documentary format: a simulacrum of didactic action, generally developed on the basis of real experiences, which aims to propose a model on which to develop an attempt to transfer, use and adapt’ (Castoldi, 2010, p. 34).

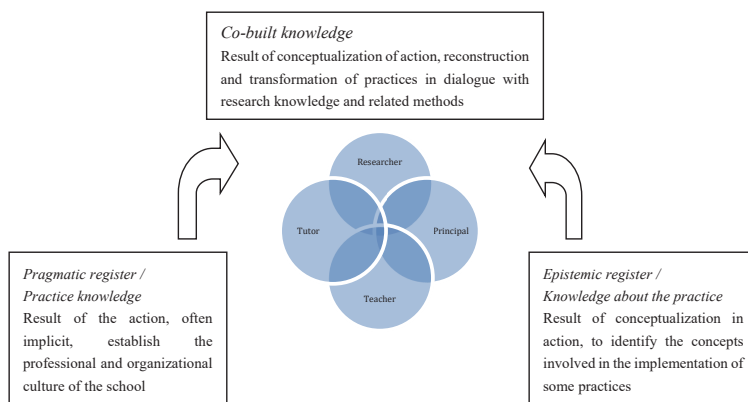
to a homogeneous criterion, that was the membership in Internal Evaluation Units and Evaluation Committees. Comprising of teachers and principals, the school staff amounted to 308 people.

The research was presented at a launch seminar for the school principals. The proposed signing agreement, which each school was going to present to its school board; the negotiated training contract of the research partners, and the two Training Units to be carried out during the collaborative RT (Research Training) were presented. Finally, on the basis of voluntary participation, the Tutors⁴ were identified as members of the DidaSco group⁵.

In a second meeting two members of the research group met the Tutors for a day of “training the trainers”, in order to illustrate the key concepts of the National Evaluation System, share a common vocabulary and the protocol of actions, carry out writing simulations of the documentary prototypes provided by the research group and to be co-built in the training laboratories foreseen by the *training course* (Improvement Plan, Skills balance, Artefacts of merit enhancement). During these two seminars, the collaborative RF (Research Training) device was shared and the validation criteria of the final products of this type of approach were illustrated (Perla, 2010; 2011).

In the last step the agreements were signed by each participating school. The RF (Research Training) device and the training contents were presented to the specially convened teaching staff in each school and the participating teachers were chosen democratically. This is an extremely important passage with regard to the design of the contents that concern the theme of evaluation: according to the hypothesis the paths on the evaluation of the system that do not see the conscious participation of the professional community should be considered of very little transformative value. In fact, in the training contract negotiated with each school, the commitment of the principals in each step of the training course and of the research was requested, and the commitment to the dissemination and utilization of the research results.

Scheme 2. Dialectical device of collaborative RF



Source: Perla, L. (2019). *Valutare per valorizzare. La documentazione per il miglioramento di scuola, insegnanti, studenti. (Evaluate to Enhance. Documentation for School, Teachers, and Students Improvement)*

⁴ The Tutors were identified among the school managers; their task was to support the trainers in the training course as veteran teachers already experienced in the evaluation processes of the system.

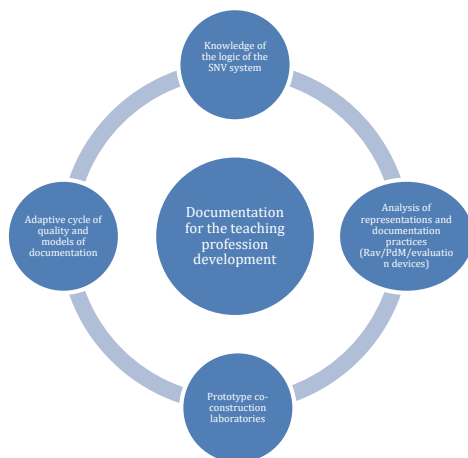
⁵ DidaSco is a multidisciplinary research group, made up of researchers from different disciplines (educators, philosophers, mathematicians, writers, historians, psychologists, sociologists), founded to meet/study the training needs in service emerging from the Italian schools.

Through the process the researchers and experts involved in the research assumed a ‘dialectical posture’. By bringing into a dialogue the voices of each one (principal, teacher, tutor and researcher), the device fulfilled the important function of constructing for everyone specific *learning postures* that alternate between theory and practice, between knowledge and action, between analysis and interpretation around to the same object of work (Perla, 2014).

Collaboration was guaranteed early on when all the devices and tools of the research were built taking into account the contribution that each ‘participant’ would make to the *setting* and the type of learning that could be developed. The result of this collaboration has been incorporated into the research output: a series of improvement prototypes, distributed to all the schools within the network and validated based on criteria such as relevance (Pellerey, 2006), evidence of effectiveness, and feedback indicating improved usability compared to the documents previously employed by the 33 schools.

This knowledge was the result of the progressive modification of the pre-existing schemes of work owned by the various actors involved in the research: the pre-existing schemes of the teaching group regarded a fragmented representation of logic (which is unitary instead) of the Italian evaluation system and caused the difficulty of “situating” the meaning of the professional writings of the evaluation within a clear frame in the objectives and functions. In the same way, the principals’ pre-existing schemes had inherited the lack of awareness of being “involved” in the evaluation model of improvement: before the research started, many principals had delegated the evaluative documentary actions to a *team of teachers*, in some cases even actions related to the compilation of one’s own portfolio⁶. By the end of the research course, during which they were entrusted with the task of tutors accompanying the teaching group, they fully understood that their presence in the *governance* of all actions was indispensable.

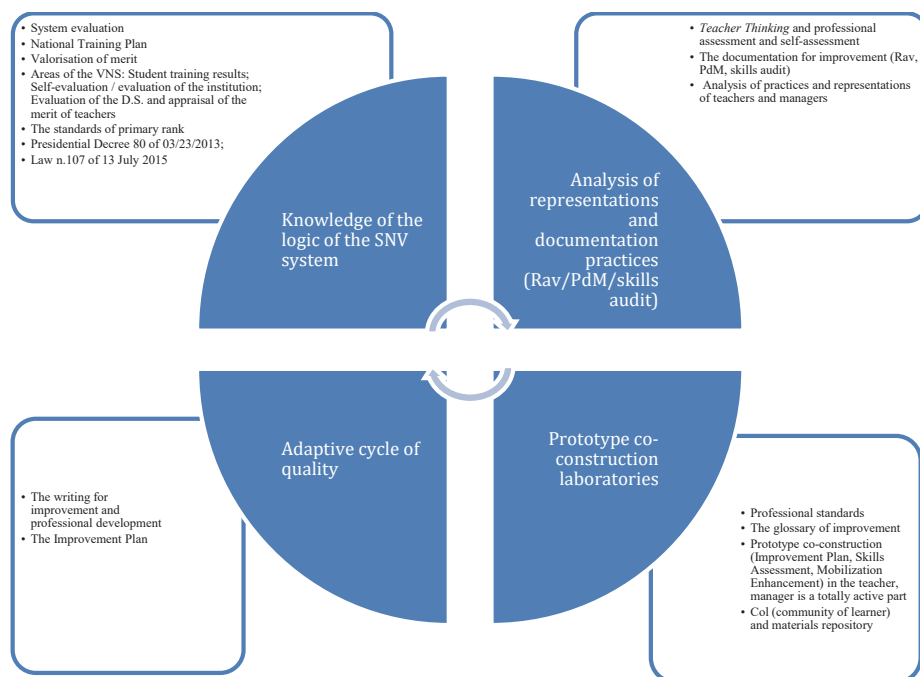
Scheme 3. The collaborative RT (Research Training) cycle



Source: Perla, L. (2019). *Valutare per valorizzare. La documentazione per il miglioramento di scuola, insegnanti, studenti (Evaluate to Enhance. Documentation for School, Teachers, and Students Improvement)*

⁶ The teacher's portfolio allows for documenting and making explicit the most significant events of the professional biography. The training path is to be documented to describe what happens in the classroom which allows for a permanent reflexivity of the teacher on his/her teaching action in a way similar to what teacher candidates use in initial teacher education programs.

Scheme 4. The actions and contents of collaborative RT (Research Training)



Source: Perla, L. (2019). *Valutare per valorizzare. La documentazione per il miglioramento di scuola, insegnanti, studenti (Evaluate to Enhance. Documentation for School, Teachers, and Students Improvement)*

The certified training unit

The training activities were organized within a ‘certified unit’ of 25 hours replicated in each Polo School⁷ and articulated in:

- a 3-hour training meeting in-presence on the key concepts of the National Evaluation System, on the meaning and content of the National Teacher Training Plan, on the internal coherence of various steps of the system evaluation, from the self-evaluation of schools to the teachers’ appraisal merit (Self-Assessment Report, Improvement Plan, Three-Year Plan of the Educational Offer, Skills Assessment);

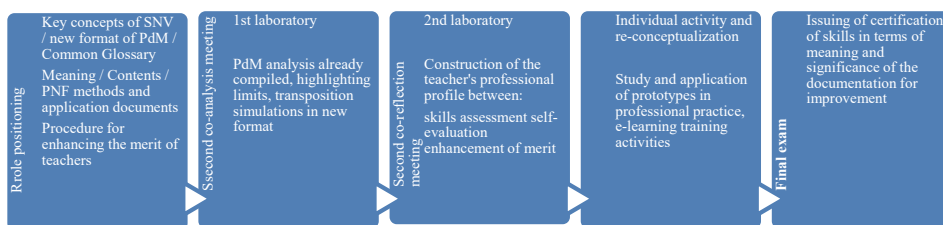
- two 4-hours laboratories focused on first, the examination of the new Improvement Plan Format structured by the DidaSco team and on the transposition of the PdM already compiled by the schools in the new format; and second, analysis of the competences

⁷ In Italy, “pole-schools” (*scuole polo*) refers to “hub schools” or “center schools”. These are educational institutions that play a central role in coordinating and providing support for a network of schools in a specific area or region. They often serve as focal points for educational resources, professional development, and collaboration among schools within their jurisdiction. Hub schools facilitate the exchange of knowledge and best practices among educators and aim to enhance the overall quality of education in their respective regions. The Polo-School organization is a direct outcome of the 1997 legislation on school autonomy in Italy, which aimed to decentralize control and promote collaboration among schools for improving education quality (DPR 8 March 1999, n. 275).

assessment for the construction of the professional profile of the teacher and of the appraisal of the teachers' merit;

- 11 hours of self-study and application in professional practice, including in-depth understanding of specific material, production and uploading of documentation on a dedicated e-learning platform in order to promote the collaborative participation of teachers in the research training process⁸ as an informal learning environment, has been structured in sections: one comprising all the materials presented in the face-to-face meetings (e.g., presentations, in-depth materials, meeting calendars, tutorial structure); a registry section, functional to the uploading of personal and context information and necessary for the quality monitoring report of the project proposal; a section dedicated to the figure of the tutors' trainers; three sections dedicated to the tools, to the "toolbox", including the Format of the new DidaSco Improvement Plan, the skills audit and the grids for the appraisal of merit; and group-sections for the uploading of documentary materials produced during the workshop; discussion forum;
- 3-hours final exam, aimed at testing the knowledge and skills gained and getting the certification, as required by the *Piano Nazionale Formazione (PNF; National Plan of Training)*.

Scheme 5. The conducting/accompanying method of *training course*



Source: Perla, L. (2019). *Valutare per valorizzare. La documentazione per il miglioramento di scuola, insegnanti, studenti (Evaluate to Enhance. Documentation for School, Teachers, and Students Improvement)*

The *training course* of the Certified Training Unit consisted of five modules. The training model was already tested in other courses (Perla, 2014; 2017; Perla et al., 2017) on the use of diversified mediators, each consistent with the "actions" of the various modules.

Each module was organized in two parts: the first on the activities requested by the teacher-trainer, and the second on work groups, following the logic of analysis-of-practice, aimed at re-conceptualizing the action (Maubant, 2011) and field validation of the document prototype.

At the end of the *training course* each teacher uploaded the materials produced during the workshop activities to the e-learning platform, namely the DidaSco document format for the completed Improvement Plan, the competences assessment sheets and the grid for the appraisal of merit⁹. All uploaded materials by the schools were analyzed by the research team, which finalized the definitive adaptation.

The research training has resorted to three methodological choices, "tested" for the first time and useful for the formalization of the prototypes: a) an incoming exploration of the beliefs and representations of teachers and principals on the documentation for

⁸ By the Moodle platform <http://elearning.forpsicom-uniba.it>

⁹ Uploaded on the platform as provisional documents to be "tested" and modified or integrated during the workshop activities and in the collegiate activities at the schools involved.

improvement; b) four co-reflection meetings between researchers, principals and teachers on the merit appraisal procedures; c) assumption by the principals of the tutoring role towards teachers.

Document for appraising: the professional standards of teaching skills and the skills audit

The second step of the research concerned the co-construction of a model of professional standards and a format of skills audit. Professional standards are competency goals that allow teachers to understand better their teaching practice, through self-assessing and/or subjecting themselves to observation by peers or external managers or evaluators. The professional standards are a set of theoretical and practical competences in which the transition from the ‘masterly’ knowledge to the ‘school’ knowledge takes place, namely in such formats as to be “learnable” to the student (Chevallar, 1995; Develay, 1995).

These standards have long been used in many European countries (Dordit, 2011; Delaney, 2012) not only to assess performance—the so-called “appraisal teacher” evaluation—but also to identify teachers’ education needs and implement appropriate professional development plans.

Policies to support the CDP through the system of standards are in place in Europe but, since an institutional model of performance standards is still lacking (European Commission, 2015), in the research carried out in Puglia the term “standard” has been adopted as a “term of comparison” to reflect on the quality of teaching and to be able to “measure” the path of professional improvement.

The adoption of the standard as the ‘term of comparison’ made it possible to give teachers not only a mere presentation of ‘standard’ models but rather a *journey* of reflection, which starting from the models of standards already approved in other countries makes them understand the changes concerning their professional profile, their teaching practices, and related indicators. This is why it was possible to use the skills audit for professional self-analysis.

The participatory reflection on how to assess and improve teaching skills, starting with the standards, has proven highly beneficial for both professional development and initial teacher education. This is attributed to the following reasons:

- a. To emphasize the inseparable connection between the improvement plan, professional self-assessment, and system evaluation, as well as the interdependence between individual development, school evaluation, and system evaluation;
- b. To provide a concrete answer to the training need of “quality assurance” and “evaluation” by adopting a critical stance with respect to the construct of the “performance cycle” that is inapplicable to the reality of teacher professional development;
- c. To promote a shared understanding of the skills currently required of the Italian teacher, as envisaged for other countries that have already benefited from institutional profiles and standard systems for many years;
- d. To acquire a common vocabulary for the documentation for professional evaluation;
- e. To familiarize teachers with the essential tools of valorization (including those for measuring *performance*): peer-review; classroom observation; video analysis; professional writing (skills assessment, competence portfolio).

“Valorization” of merit

We observe, at international level, an increasing interest for teacher’s evaluation and appraisal systems (Avalos, 2004; Avalos & Assael, 2006; Chow et al. 2002; Flores, 2010;

2012; Middlewood & Cardno, 2001; OECD, 2009; Shinkfield & Stufflebeam, 2012; Stronge & Tucker, 2003; Townsend & Bates, 2007;). Several authors argue that teacher evaluation systems can play an important role in improving teachers' effectiveness and supporting their professional development (Beerens, 2000; Danielson & McGreal, 2000; Delvaux et al, 2013; Fletcher, 2001; Flores, 2010; 2012; Stronge & Tucker 2003; Tuytens & Devos, 2011). Indeed, many countries (e.g. Portugal, New Zealand, United States of America) have implemented teacher evaluation systems in order to improve teaching. As Flores highlights (2010), teacher's evaluation systems are tightly related with the quality of the teaching processes, with the achievement of learning outcomes (Darling-Hammond, 2010; Darling-Hammond et al., 2017) and with precise visions of the teaching (Flores, 2005; Day et al., 2007; Sachs, 2003).

The co-construction and analysis of the merit valorization sheets are the last links in the "chain" of documentary devices designed for school improvement and teacher professional development, subjected to experimentation in the research.

On the one hand, the skills audit reflected the professional profile of the teacher and the skills that make it up; on the other, the merit valorization sheets are mainly linked to the strategic priorities that the school sets as goals in the Improvement Plan, which in Italy lasts three years.

While the skills audit must refer to professional development standards related to the teacher's competence profile (and as such, although modifiable, it can substantially maintain a common format), the merit valorization sheets are to be considered *contextual*, as in close relation with the specificity of each school identified in its fundamental documents, i.e. PTOF¹⁰ (*Piano Triennale dell'Offerta Formativa*, Three-Year Educational Offer Plan), RAV and PdM especially.

The recommendations of Avalos and Assael (2006, p. 265), for the implementation of teacher performance assessment systems, were referenced by Flores (2010): promoting a "wide participation of all interested parties, in particular of the teachers"; formulate the "criteria in a participatory way" on the basis of existing knowledge on competent, expert teaching; try a "variety of procedures and tools"; connect the evaluation of teachers' performance with other policies for teachers (i.e., professional development opportunities); do not hasten the design and implementation process; implement the evaluation process monitoring and be willing to implement the necessary adjustments.

The materials for the valorization of merit, used in partner schools and subjected to analysis by the research group, have been shared through an online environment, specifically dedicated to the project, within the elearning.forpsicom-uniba.it platform. All documents from each school participating in the investigation were uploaded for the further use. Overall, there were 56 documents.

The documents were subjected to a double level of analysis. The first *descriptive / structural level* was intended to understand:

1. *the type of document* and its significance within the procedure: forms to indicate preconditions/criteria for access to the bonus; charts/rubrics/questionnaires for the quantification of evidence; declarations of the teachers about the activities carried out; communications and circulars for the school sharing of the reward procedures; criteria on how to assign the score, etc.;

¹⁰ PTOF stands for "Piano Triennale dell'Offerta Formativa" (*Three-Year Educational Offer Plan*). It is a fundamental document in the Italian education system prepared by each school institution. It outlines the planning and organization of educational, cultural, and sports activities within the school for a three-year period. The PTOF aims to define educational objectives, teaching methodologies, curricula, available resources, and evaluation methods to ensure a quality educational offering. It serves as an important tool for self-assessment, school orientation, and as a reference for external evaluations conducted by educational authorities.

2. the *internal structure* of the sheet for the reward calculation, which explains the logic that leads to the attribution of the bonus and the distribution of the shares (i.e., score ranges and/or rankings based on the sum of the number of evidences declared by the teacher, ‘a priori’ established score ranges, percentage divisions with respect to the number of teachers, etc.).

The second level of more *in-depth* analysis, carried out on exemplary documents, has shown that the criterion of *differentiation* rather than *homogeneity* prevailed in the distribution of the prize shares.

The research has shown that the concept of merit must be linked to those of *hierarchy* and *quality*, both opposed to the “rain” distribution logics that lead to cultural flattening and demotivation, even of those who stand out for commitment and excellence. The merit is linked to the possibility of exploiting on the basis of potential and, therefore, to the criterion of *differentiation*.

However, there is a need for two essential preconditions so that the entire valorization system does not turn into a risky instrument:

- the *objectivity* of a third point-of-view, external with respect to the entire procedure;
- the *sharing* of the reward system.

The self-evaluation of the teacher and the evaluation of the principals are not sufficient: a third body is needed, a committee composed of both internal (teachers, students, principal) and external representatives (parents, experts).

For this reason, the Evaluation Committee¹¹ assumes importance, which albeit with the coordination of the principal, defines the actions associated with the three macro-areas of the evaluation and acts as a guarantee and objectivity between the main parts of the relationship.

Even the procedures that most closely pertain to the competence of the school principal—such as the definition of the criteria for classifying the positions of individual teachers to be admitted to the bonus (how many to admit and with what weight), as well as the criteria for dividing the prize amount assigned to the school from Italian Ministry of Education (MIUR)—should be traced to the Evaluation Committee as the object of prior communication in the OO.CC.¹²

The second precondition—the *sharing* of the reward system—becomes useful and functional to enhance learning if it is assumed responsibly by all the actors who “inhabit” the school context, first and foremost the teachers. This entails the possibility of rethinking and modifying the tools in use, to be subjected to monitoring actions, and to take the utmost care of the communications. From a procedural point of view, it is appropriate that the valorization of merit meets the criteria of transparency of communication and maximum sharing with the collegial bodies of the school.

The methodological-educational choice of the principals as tutor

Within the research training a specific tutoring organization was adopted: for each group of 10-15 teachers, there was the interaction involving a pair of *coordinating Tutors* (trained by the DidaSco research group) and an *internal Tutor*, who was a participating principal engaged in the training activities.

¹¹ The Evaluation Committee (in Italy, the Internal Evaluation Unit) is established for promoting and implementing the activities connected to the Italian National Evaluation System for schools. It has been assigned relevant functions with regard to the Scholastic Institution’s self-assessment processes, the compilation of the R.A.V., and the planning of school improvement actions.

¹² Collegial bodies are provided at various levels of the Italian school and with specific rules (Presidential Decree No. 416 of May 31, 1974). Their function could be consultative and proposal at the basic level (class and interclass councils), deliberative at the higher levels (councils/institute board).

Two reasons were determined for the 'intense' involvement of the principals in the research training activities:

The *first* is linked to the scientific research training design, which takes the system's evaluation documentation as closely linked and, therefore, connects the three-year professional development plan both with the skills audit of teacher's competences and with the strategic needs of the Institute, highlighted in the Improvement Plan and in the PTOF.

This perspective encourages both teachers and principals to reflect on their professional profile, accepting the logic of a critical re-elaboration of the teaching experience through a self-assessment process: the principals, specifically, in compiling the Portfolio (in the third section "Objectives and professional actions") select and document some significant professional actions undertaken to pursue school improvement objectives.

The *second* reason concerns the strategic function of the school principal (Moretti & Alessandrini, 2015) called to express high organizational skills (Bochicchio & Rivoltella 2017; Perla, 2017). School principals are asked to promote participation in professional contexts to welcome innovation: they take on the role of advisors in the experimentation (Quinn et al., 2004) and supporter in the training processes.

As highlighted by Rosa (2016), the role of school managers as a training support in the Italian school context has recently acquired progressive relevance in the phase of teachers' professional life, called *induction* (insertion of a tenured position into a specific school context) (Bickmore & Bickmore, 2010; Carlson, 2012; Cherubini, 2009; Fantilli & McDougall, 2009; Scherff, 2008; Winstead Fry, 2007), and refers:

- the *ongoing* forms of support for principals as the initial acceptance of the newly hired in the school community and the final evaluation, carried out in multiple processes, including the organization and management of *mentoring* activities (Angelle, 2002; Brock, 1999; Wood, 2005; Watkins, 2005);

- the promotion of a clear, transparent and shared vision of the objectives pursued, of the strategies envisaged and of the role pertaining to the involved people;

- the promotion of participation in training courses.

The personal involvement of the principals within the research training course certainly contributed to conveying, in the teachers' perceptions, a clear message about the importance of connecting self-assessment and individual development plan with the self-evaluation and the improvement plan system, and about the assumption of shared responsibility and the promotion of a collaborative culture indispensable for raising the quality of the school.

Results

The results of the research training aimed at teachers allow to deepen some aspects of such a complex topic, such as the enhancement of professionalism (Perla et al., 2021). This concept can be translated into practical and effective measures when integrated into a culture of self-driven professional enhancement and the corresponding widespread distribution of supporting scientific documentation (addressing the first research question). In the research and development of effective documentary tools for an Italian "third way" to professional development, schools and universities are engaged. This "third way" involves professional writing for valorization, serving as an alternative to the behaviorist and pragmatist paradigms of teacher effectiveness, as well as diverging from the guidance and consultative paradigms of a Francophone tradition, which represent the first and second approaches, respectively.

The collaborative approach of research training has supported the elaboration of a methodological protocol in favor of the schools involved, offering them *structured*

feedback other than that already provided to them through the evaluation procedures established by Italian Presidential Decree 80/2013. The work on the Improvement Plan, the standards and skills audit, and the comparison of the merit valorization sheets was useful because it allowed the groups involved to deeply understand the logic of quality and to overcome the representations of bureaucratic fulfillment that is associated with the implicit organizational culture of the schools.

Research institutions, universities, foundations, cultural and professional associations can support schools in the complex process of deconstruction of representations (2nd research question). This is why the partnership between schools and universities must be supported when work is needed on the constructs of difficult practices such as self-assessment/evaluation based on improvement.

In fact, the research training project offered *personalized feedback to the schools*, which was particularly significant among decision-makers for future endeavors. This aligns with international literature (Dederling & Muller, 2011; Ehren & Visscher, 2008; Klerks, 2013) that confirms how constructive comparative actions, such as feedback, stimulate improvement. In other words, it is worth investing in improvement because at present, “the part about improvement is the one less experienced by school systems and on which there are fewer elements able to understand the extent of the effect of improving students’ results” (Fiore, 2017, p. 148).

Another decisive element, which emerged from the research, is the investment in the creation of the culture of improvement (since the 1990s assumed by the educational policies of European countries as the central engine of the knowledge society), provided by the training on improvement documentation.

One of the major risks for the internal evaluation process in schools (*internal evaluation* or *self-evaluation*) is in fact that of self-referentiality, especially if the process is not accompanied by external parties that provide feedback.

The standards, system of indicators, skill audit and merit valorization sheets have proven to be very useful devices for avoiding this risk for the schools, both because they allow comparison, and because they promote the growth of awareness and credibility of the evaluation process. Training in the documentation improvement contributes to winning the ideological tendency to organized resistance in the schools against the evaluation that has had a serious confrontation for years, on the political and scientific level, on the possible evaluation systems to be introduced in our system. The research suggests not to diverge from the path to promotion of improvement processes, despite the difficulties and challenges.

The third and last aspect highlighted by the research, the most important, concerns the role of the principal in the improvement process: a *pivotal lever*.

The role of the principal, as stated by Law 107/2015, is increasingly decisive, in fact, for the purpose of improvement so much, so that the connection between the principal's remuneration and the results achieved in managing the school is hypothesized. Several studies on principal leadership have already highlighted the pivotal role of this position, further validated by projects conducted by Indire (PQM, VSQ, VALeS¹³). These projects placed significant emphasis on the principal as an agent of values and informal skills, aiming to disseminate a culture of improvement.

Article. 1, paragraph 93 of law n. 107/2015 ratified this distinction by highlighting the “specific nature of the functions”, such as managerial and organizational competences

¹³ PQM (Piano Nazionale Qualità e Merito – National Quality and Merit Plan), VSQ (Valutazione per lo Sviluppo e la Qualità nelle Scuole - Evaluation for Development and Quality in Schools) and VALeS (Valutazione e Sviluppo della Scuola - School Evaluation and Development) are three national experiments that provided the model, currently in use in Italy, for school improvement.

and the enhancement of the professional merit of the school's staff. The research carried out confirms this line of interpretation regarding the close and indissoluble connection between the figure of the principal and improvement of the school – indeed, the absence of the principal in the documentary writing process corresponded to a low motivational and reflective tension of the group involved: it is a point of attention and re-launch that encourages further enhancement of this profile.

Perspective conclusions

The research has involved more than 300 teachers and principals on the complex topic of documentation that improve teaching professionalism and school procedures. In the course of the investigation, we have developed a training device, which impact will be assessed at the end of the three-years training program at the Puglia *pole-schools*¹⁴. However, it is now possible to derive perspective syntheses that we offer the professional and scientific communities and political decision-makers for reflection.

The collaborative approach of the research training has made it possible to include further feedback into the methodological protocol than those already provided for by the law¹⁵ (Presidential Decree 80/2013). The same 'voice' of teachers and principals has expressed the need for constant monitoring of the improvement process, with frequent feedback on the development of a 'culture of improvement'. The work on the PdM, standards, the balance of competences, and the comparison of the valorization sheets has favored the understanding of the logic of quality, the emancipation from representations of bureaucratic fulfillment, sometimes implicit in the school culture. In order to deconstruct such representations, long and patient follow-up interventions by research institutions, universities, foundations, cultural and professional associations are required. When it is necessary to intervene on complex processes such as self-evaluation/evaluation according to improvement, partnerships between schools and universities should be encouraged (Perla, 2015). First and foremost, the research training project has carried out *personalized feedback* to the schools.

This constructive comparison (*feedback*)—as shown by literature—promotes improvement: “the (...) improvement is the one of the less experienced level by school

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¹⁵ Presidential Decree 80/2013, also known as "Regulation on the Evaluation of the National Education and Training System," outlines the legal framework for evaluating the Italian education system. It includes provisions for the evaluation of schools, teachers, and students. Under this decree, the main feedback mechanisms and evaluations include: *School Self-Evaluation*: Schools are required to conduct self-evaluations to assess their educational activities, results, and organizational aspects. This self-evaluation provides feedback on the school's performance and helps identify areas for improvement; *External Evaluation*: External evaluators, often appointed by regional education authorities, conduct assessments of schools. These evaluations involve visiting schools, reviewing documentation, and observing teaching practices. The feedback from external evaluations serves as an important source of information for school improvement. *Student Assessments*: The decree mandates standardized national assessments for students at various grade levels. These assessments provide feedback on students' academic achievements and help identify areas where additional support or improvement is needed. *Teacher Evaluation*: The decree also includes provisions for teacher evaluation, which typically involves self-assessment, peer assessment, and administrative assessment. This feedback helps teachers gauge their performance and professional growth areas. *Data Collection and Reporting*: Schools are required to collect data on various aspects of their operations and report this information to regional education authorities. This data collection and reporting process generate valuable feedback on school performance. The collaborative approach mentioned involve expanding upon and enhancing these feedback mechanisms, incorporating additional perspectives and insights from various stakeholders such as teachers, students, and parents. This collaborative approach aims to foster a more comprehensive and inclusive feedback system to support educational improvement.

systems (...) there are fewer elements able to understand the measure of the effect of the improvement on the outcomes of the students” (Fiore, 2017, p. 150).

Another aspect to be emphasized is the possibility of spreading the culture of improvement—one of the core drivers of the knowledge society—precisely through training on improvement documentation. Self-referencing is the greatest risk of the internal evaluation process in schools and it happens when the school is not accompanied by outsiders providing feedback. The documentation of improvements serves as valuable tools for several reasons. First, they enable comparisons, providing a benchmark for assessing progress. Second, they foster greater awareness and enhance the credibility of the evaluation process by offering tangible evidence of improvement. The school often strives to resist assessment procedures, because of its ideological position, especially if these procedures are carried out by external certification bodies. This stance has, for years, hindered a significant discourse on both political and scientific fronts concerning evaluation systems. However, this survey indicates that we should not deviate from our commitment to advancing improvement processes, even in the face of challenges and disparities along the way.

The third and decisive aspect highlighted by the survey concerns the role of the school principal as a 'lever' in the improvement process. Law No. 107/2015 has already recognized the significance of using school performance results to determine remuneration, emphasizing the importance of improvement efforts. The numerous studies on the school principal's leadership¹⁶ (Leithwood et al., 2008; Paletta, 2014) highlighted this promotional function, confirming the results of the INDIRE investigations (PQM, VSQ, Vales). Article 1, paragraph

93 of Law no. 107/2015 recognized the 'specific nature of the functions' such as managerial and organizational competences, and the enhancement of the professional merit of the school staff. Our investigation confirmed this interpretation highlighting that, during the document writing workshops, the motivational and reflective tension of the group was missing with the absence of the principal. We affirm that 'school manager' and 'improvement' are closely and inextricably linked.

In general, it would be necessary to critically assume the studies that put a simple and direct relationship between input factors and output factors without adequately investigating what is in the middle, i.e. mediation teacher's function which is fundamental for the teaching 'action', although implicit.

The present study enables the research and professional communities to reflect on what it means to document to enhance and to address a crucial point of the contemporary debate on the school: the link between improvement and professional development (Perla et al., 2021; Margolis & Strom, 2020). Self-evaluation and improvement help to connect the quality needs of the school's stakeholders (families, first of all) with the urgency of restoring authority and value to the teaching function. This is also why we believe that training support devices can be useful: telling the schools that quality is an achievable landing place, not just an abstract and distant project.

The devices and practices of evaluation/self-evaluation of one's teaching should be one object of learning already in the initial teacher training courses, where it is necessary

¹⁶ Seven 'strong statements' on the school leader's successful leadership, including: 1) is second only to classroom teaching in terms of relevance to learning; 2) successful leaders resort to a consolidated repertoire of practices; 3) the methods of application of these practices are adaptive, not ritual; 4) improves teaching and learning through indirect influence on staff motivation; 5) influence on improvement when it is widely felt and rooted within the school culture.

to intervene immediately in overcoming prejudices and misunderstandings regarding evaluation, in general, and self-evaluation.

More and more countries are paying attention to the development of teachers' assessment and self-assessment skills. The works of the Irish Teaching Council (2017), the Turkish Ministry of National Education (MoNe, 2017) or the English Department of Education (DE-UK, 2018) shed light on these issues.

In Italy, in the actual initial training curriculum for primary and pre-primary teachers (see Degree in Primary Education Sciences (Ministerial Decree no. 249 of 10 September 2010), the topics of the evaluation and self-evaluation are respectively established within:

- within related courses or modules (see 'Theory and Methods of School Planning and Evaluation', or 'Docimology', of 60 hours, equivalent to 2.5% of the total curriculum hours);

- in indirect internship meetings held with university supervisors.

As regards the latter, within the Indirect Internship Guide it is common to find topics such as:

- *observation, implementation, and formative evaluation of an educational segment with experience documentation;*

- *observation, implementation, evaluation and documentation of an educational segment that aids in reflecting on the experiences reported by trainee teachers in their internship diaries.* This process may involve the use of specific documentation provided by supervisors, such as example formats for PTOF or competence assessments.

Even in the current initial training curriculum for middle and high school teachers, known as the "24 CFU course," evaluation topics have been made mandatory for access to the internship since Ministerial Decree No. 616 of 10 August 2017, Annex A, in the field of "Pedagogy, Special Pedagogy, and Didactic Inclusion." These topics are explicitly stated as educational objectives within this curriculum.

Theories and models related to the design, monitoring and evaluation in school contexts and in teaching-learning processes, with particular attention to the evaluation and self-evaluation devices of the educational action of teachers and of the training processes of female students and secondary school students;

The main theories for the evaluation of learning and training processes.

However, the exercise of self-assessment remains uncovered as the '24 CFU course' has not currently found a continuation in the FIT (Initial training and internship) path¹⁷, as expected by the 'interrupted' reform, and therefore does not have functional places and devices for reflective return to the didactic practice of the internship.

The research training experience described, which involved the in-service teachers, provides useful insights for initial training, at least in Italy, in so far as:

- recalls the usefulness of a training in the evaluation and meta-reflective self-assessment on training processes also intended as a stimulus to documenting skills, i.e. by the conscious and collaborative use of the documentation formats, as already provided for in the Degree in Primary Education Sciences curriculum, among the objectives indirect internship training;

¹⁷ The Law Decree n. 59/2017 had provided for an initial two-phase training for middle and high school teachers: theoretical courses in transversal area ('24 CFU ') and one year of training into the schools (' FIT '), but the implementing decree has not yet this latter segment is operational (Perla 2020). A forthcoming decree (Prime Ministerial Decree '60 CFU') is going to define university initial training pathways for middle and high school teachers, in reference to the law n. 79/2022. Such law, named 'Bianchi Reform', envisages a qualifying university initial training pathway (corresponding to at least 60 training credits), with a final test; a national public competition held annually; a one-year in-service probationary period with a final test.

– underlines the need to extend specific interventions on documentary skills to each segment of initial teacher training, including middle and secondary school, as stated in the intentions (Ministerial Decree no. 616/2017) but in fact rendered inactive.

In this way, training on evaluative and self-evaluative practice would help to educate teachers to be open to comparison and improvement from the very beginning and throughout the development of their careers.

As the literature suggests (Absolum et al., 2009; Aksit 2016; Boster, 2016; Sharples et al., 2014), it is necessary that the attitude of questioning oneself and the ability to verify the effectiveness of one's work—typical of a 'good' teacher—are developed right from the beginning of the course of preparation for teaching, not only in the advanced stage, as a sign of mature professionalization. On the operational level, both the designers of the initial training curricula and the expert teachers entrusted with the preparation courses, as in the case of Degree in Primary Education Sciences, should resort to documentary analysis practices (e.g. through organized tasks, project work, analysis of cases, etc.) that favor in student teachers a first, embryonic development of evaluative and self-evaluative 'know-how'

Our investigation has shown this connection and now it is the time to share the landing places.

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