

The use of the PDCA cycle and the 5W2H tool as quality control tools by school management

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ABSTRACT

The school is the space where administrative and pedagogical aspects intersect. Therefore, it should imprint on the subjects productive and critical administrative-pedagogical experiences. For the school to be aligned with these principles and the objectives that underlie them, school management needs to assimilate quality tools so that the execution of its role is positive. Given the above, the present work aims to reflect on the importance of quality tools in school management and suggest the use of the PDCA cycle in conjunction with the 5W2H tool. The bibliographic review technique was selected as a research method, unfolding on texts that expand the initial debate on the theme of quality in management processes at school. At first, data collection was performed using the descriptors "quality management in education", "quality control tools in education", "PDCA cycle" and "5W2H tool" on the Google Scholar platform. Different combinations of these descriptors were used through the Boolean operators "OR" and "AND" to obtain a more specific result. The analysis of the results was carried out through the synthesis of the information contained in the selected articles, with the aim of presenting a broad and objective view of the proposed theme. Finally, we reached an understanding of the relevance of quality control tools for school management, here more specifically the PDCA cycle added to the 5W2H tool, playing a fundamental role in the administrative and pedagogical organization of the school institution, with positive effects on the processes that develop within it.

Keywords: PDCA Cycle, Quality Control Tools, School Management, 5W2H Tool.

1 INTRODUCTION

Until the 1980s, the debate on the quality of education in Brazil was closely linked to the idea of expanding access to school as a subjective public right guaranteed by the State, as established in the Federal Constitution of 1988, which is based on the principle of redistributive justice of social and economic goods. Despite being an achievement for the entire Brazilian society, the expansion of access to school has generated concerns about the quality of education, because it is not enough just to put citizens in the classrooms, but it is also necessary to think about the conditions (both structural and pedagogical) in which these students will remain and the social and economic results resulting from this new reality.

In the current national scenario, the issue of the quality of education and school has gained increasing proportions and competed for space in public debates, although sometimes being relegated



to the dimension of mere rhetoric in government plans, among education professionals, school community and even in the scientific field of education. Behold, the implementation of a quality school faces its most diverse obstacles.

Although quality is a recurrent notion in several contemporary discourses about educational processes, a constellation of meanings resides under this notion. Behind an apparent consensus, that everyone wants a "quality education", there are dissonant, if not radically opposed, conceptions that aggregate around themselves diverse interests and political arrangements, as well as diverse perspectives and educational practices. Some of these conceptions were limited to specific historical moments responding to problems or fomenting changes, others to "fads", as well as several of them can cohabit the same historical moment, overlapping, adding or conflicting with each other (Dametto, 2017, p.21).

As has been noted through the excerpt above, the strategies and planning that aim to improve the quality of education usually arise because of the processes of reform and state control, that is, of the macro environment, and present configurations related to the organization of education systems. Thus, Abrucio (2018) states that

In Brazil, the educational system is more network-oriented than school-oriented. But even if the role of the network is greater, school management is decisive for the proper functioning of education and for obtaining positive results in student learning (Abrucio, 2018, p. 18).

Currently, in view of this, the management of schools has been highlighted as a central point in the transformation of educational systems, not limited only to the organizational spheres of educational systems, but also to the elaboration of proposals for autonomy and decentralization within each educational institution. The school is a space where administrative and pedagogical aspects intersect. Therefore, it must impress on the subjects productive and critical administrative-pedagogical experiences. In order for the pedagogical organization and administrative structure of the school to be aligned with these principles and the objectives that underlie it, school management, therefore, needs to assimilate quality tools so that the execution of the role of the manager is effective and positive. In this way, the manager acts as an articulator and school management is no longer considered only an administrative and bureaucratic position, but rather plays a significant pedagogical and leadership role, which is fundamental for the school to achieve the desired teaching quality standards and for effective learning by all students.

These are significant implications that are consistent with a quality school and that meets the thinking of a school management, especially in the public network, which wants to be democratic and, therefore, participatory, as confirmed in the words of Oliveira and Vasques-Menezes (2016, s.p.), when they assert that "the principle of democratic management includes the active participation of all teachers and the school community as a whole, in order to ensure quality for all students." Thus, it is necessary that all people involved, directly or indirectly, in the educational process contribute daily to the construction of this school environment. Corroborating this reflection, Dourado (2016) states that



if we want to make the school a significant formative space for the formation of the subjects we must reflect, in a systematic way, on the different practices, the conceptions that guide them and, thus, we will understand the importance of the organization of the pedagogical spaces and times, of the dynamics of participation that involve each and every one in the management and construction of a quality education (Dourado, 2016, p. 18).

Still, but far from reviving the management logic adopted by certain public administrations that is based on a managerial model in which autonomy is limited to managing financial resources with efficiency and productivity, it is important that school management acquires fundamental notions of qualitative management of resources, not only financial, but also human, so that even those are at their disposal. And it is with this purpose that there are management tools whose focus is to improve the processes and the quality of the service offered.

In this sense, quality management tools need to be seen as a primordial element for the control and improvement of the administrative-pedagogical organization of the school and that fit in any school organization, even in the public school. It is in this conceptual space where the basic management instruments can be based on the construction of a more productive and assertive school management that excels in the co-responsibility of the actors involved in the search for excellence in the educational processes that are offered by the school to society. And among the various basic quality tools, the PDCA cycle, an acronym that represents, in English, *Plan, Do, Check and Act* (Planning, Organization, Direction and Control), is shown as an instrument that is easily adapted to any school context, because it does not require financial cost and its handling is of low complexity. With equal justification, the use of the 5W2H Tool inserted in the context of application of the PDCA cycle as methodological support for task assignment and monitoring of the action plan in quality management is addressed.

In view of the above, the present work aims to reflect on the importance of quality tools in school management and suggest the use of the PDCA cycle articulated to the 5W2H tool.

2 METHODOLOGICAL PROCEDURES

This work was based on a qualitative approach, since qualitative research is essentially interpretive, which means that the researcher interprets the data from a more general understanding of social phenomena (Creswell, 2021). It is, moreover, a research of the bibliographic review type that, according to the definition of Gil (2017), is characterized as a type of research that is based on material already published. We used printed materials and original scientific articles indexed in Google Scholar. Add to this its exploratory objective, which aims to provide greater familiarity with the subject, making it more explicit or constructing hypotheses. It is concerned, therefore, with observing, recording, and analyzing the facts without the researcher having a preconceived idea of what he may find. In this sense,



the literature review is an important tool for data collection, in order to raise relevant information on the proposed theme (Gil, 2017), which also shares with Canuto and de Oliveira (2020), when they affirm that

This type of method allows a broad description on the subject, but does not exhaust all sources of information, since its realization is not done by systematic search and analysis of the data. Its importance lies in the rapid updating of studies on the subject" (Canuto & de Oliveira, 2020, p. 85).

This, therefore, allows a broad panorama of the theme from the academic texts. At first, data collection was performed using the descriptors "quality management in education", "quality tools in education" and "quality control in education", "PDCA cycle" and "5W2H tool" in the Google Scholar platform. Different combinations of these descriptors were used using the Boolean operators "OR" and "AND" to obtain a more specific result.

The inclusion and exclusion criteria for the studies were defined based on the research objectives. Thus, only articles published in Portuguese that address public school management, present the PDCA cycle and/or the 5W2H tool as quality control tools, and that were published between 2013 and 2023 were included. Articles that did not meet these criteria were excluded.

The analysis of the results was made through the synthesis of the information contained in the selected articles, with the objective of presenting a broad and objective view of the proposed theme.

3 RESULTS AND DISCUSSION

3.1 CONCEPTUALIZING QUALITY MANAGEMENT

The social imaginary daily reiterates the discourse that education in Brazil – most notably the public – is of poor quality. In the scientific scenario, the hegemonic discourse of the intellectuals was structured – and still is structured – on the terrible management of the state with regard to teaching, and it is necessary to rescue the quality of education in view of the massification of education already raised – as a polarized and non-coexistent logic. Drawing on the reflections of Paro (2022),

It is necessary to ask if the school would be nothing more than a place where children and young people in need of knowledge flock, who are accommodated in buildings with precarious conditions of operation (with a lack of material of all kinds, with numerous rooms, which attack a minimum of pedagogical common sense) and are attended by staff and teachers with increasingly debased salaries (which barely allow them to survive, let alone competently perform their functions). In other words, to understand what lies behind the official discourse, one must inquire about what it is that the State is offering in the amount of which it boasts so much (Paro, 2022, p. 2).

Faced with this portrait, the democratic aspect of public education in Brazil is still presented in the opposite direction of quality, because the process of democratization of access to education of the



FHC period – Fernando Henrique Cardoso – was crossed by the qualitative character of what would be and how it would be offered and how this offer would be evaluated (Barbosa, 2019). On the other hand, "with concepts and techniques of the productive/business sector applied to education, quality began to have a different meaning from what was thought until then" (Barbosa, 2019, p. 19), serving, therefore, to maintain the productivist educational system. However, to dispel possible conceptual obstacles, it is necessary to define, here, that school management and a capitalist company differ as to the purposes to which they are proposed. The specific nature of the pedagogical process prevents the widespread application of the values and concepts that are common in a capitalist enterprise within a school. For this reason, it is not feasible to adopt, in school, the same procedures, objectives and political principles used by business administration (Paro, 2022).

Legitimizing this conceptualization, Abdian and Oliveira (2015, p. 179) clarify that "the school, constituted by political human beings, presents the potentiality of transformation, construction of identity and own modes of functioning."

The implementation of this management model faces constant challenges. Democratic school management requires the reformulation of several issues. The community has the role of demanding from the state and public agencies the preservation of the quality of the school, ensuring that the management, maintaining its autonomy, creates administrative monitoring instruments that prioritize pedagogical excellence. The democratic management of the school is based on the concept of "negotiated quality", which considers the complex relationships that exist at both broad and restricted levels within the school. This strategy aims to achieve, through communication and participation, educational objectives that are shared. Still in the words of Paro (1998),

To respond to the demands of quality and productivity of the public school, the management of education must be fully realized in its mediating character. At the same time, consistent with the dialogical characteristics of the pedagogical relationship, it should assume the democratic form to meet both the right of the population to democratic control of the state and the need that the school itself has for the participation of users to perform its functions well (Paro, 1998, p. 7).

According to Barbosa (2019), the school, because it consists of intra and extracurricular dimensions from specific time-space, the evaluative criteria for quality must inhabit these aspects, whether in the historical, sociocultural, economic or political context. Thus, there is an administrative implication that stems from the conception of quality, because it is a management, whether educational or school. The first is directed at a democratization of the basic school, which enables access and permanence, albeit precariously, at quantitative and qualitative levels, and the second, collective participation and the school community is attributed, being a positive management that fulfills a series of responsibilities.



In Indicadores da Qualidade na Educação (2004), a UNICEF text published in Ação Educativa, there was already a reinforcement of the displacement of the quality of public education administered by the State to the school community itself – fathers, mothers, guardians, education professionals, guardianship counselors, among others –, signaling that there is no quality standard, given the diversity of contexts in which schools are inserted. Thus, "*quality* is a dynamic concept constantly reconstructed. Each school has the autonomy to reflect, propose and act in the search for the quality of education" (Indicadores, 2004, p. 5).

This quality is verified by the school community through a set of indicators that should assist in the evaluation and improvement of school quality, that is, identify the general panorama, positive and negative aspects of the school, enabling the propagation of knowledge about the school reality with regard to quality - and have a framework to discuss and demand about the needs of the school in order to improve it.

3.2 THE IMPORTANCE OF QUALITY MANAGEMENT IN SCHOOLS

According to Santos (2014), the

Management is the process of organizing executing a line of action, executing a plan. Although there is a vision of management with a broader meaning, taking it as a synonym for administration. Management is considered as a function or part of an administration (Santos, 2014, p. 15).

Thus, for the school to reach ideal levels of teaching quality, it is necessary that some roles are effectively put into practice, such as that of the school manager. The school management falls on an entire administrative-pedagogical organization that is also demanded by a collective action, diluting the traditional logic of management, "as if the planners had the knowledge of reality and the technical-scientific competence to direct it, leaving the others only to comply with determinations", that is, "as if they were not able and incompetent to opine in the pedagogical organization of the school" (Santos, 2014, p. 14).

On the other hand, democratic management is instituted by the Federal Constitution of 1988, which crosses from basic education to public higher education, touching the fields of educational policy and legislation. Thus,

In this way, democratic management represents the democratization of discussions related to the school and its role in the community. Everyone will be concerned to add elements of progression and not only of criticisms about the structure of public schools, whose precariousness in which it is found is common knowledge (Poletto, 2015, p. 35).

In this sense, the way management processes are organized must be aligned with the social and political objectives of education with regard to the training of students, demarcated as the main concern



of quality management of public education. But it is a quality controlled by the school community, which must be in dialogue with the school demands, committing to them and developing roles that compete with it. Thus, we speak of a democratic-participatory management, which

It is developed from some principles: autonomy of the school and the educational community; organic relationship between management and the participation of school team members; community involvement in the school process; activity planning; continuing education for the personal and professional development of members of the school community; use of concrete information and analysis of each problem in its multiple aspects, with broad democratization of information; shared evaluation; productive and creative human relations, based on a search for common goals (de Oliveira; Libâneo &Toschi, 2017, p. 456).

Therefore, from this perspective, shared accountability is valued when all the actors of the school community are involved and a democratic-participatory management is thus achieved. Thus, educational institutions must assimilate structured and coordinated activities for their functioning, following four aspects: planning, organization, direction/coordination and evaluation (de Oliveira; Lebanon & Toschi, 2017). And it is from this dialogical process that the collective construction of the Political-Pedagogical Project (PPP), for example, occurs.

Thus, in a school institution, management has a fundamental role, after all it is up to a whole organizational logic that is established from the planning of actions thought and executed by the education professionals of the institution and the school community.

3.3 THE IMPORTANCE OF MONITORING TOOLS FOR QUALITY MANAGEMENT AT SCHOOL: THE PDCA CYCLE AND THE 5W2H TOOL

Diniz and Carrazoni (2018) state that among the many obstacles they observe and that make it difficult to achieve quality in schools, such as low teacher remuneration and poor infrastructure, are the lack of management and the absence of hierarchies. In an attempt to mitigate these obstacles, the management of the public school can make use of management instruments proper to the administration and that seek excellence in the quality of the services provided. Given this effort, quality tools are developed and applied to evaluate, monitor and improve the quality of teaching of an institution and are paramount for planning, monitoring routines, correcting routes and ensuring quality control. These tools – adaptable and reorganized in each context – are also forceful to the public organization. Thus, "the use of tools is extremely important for quality management, because with their use provides the occurrence of continuous improvement of processes" (Diniz & Carrazoni, 2018, s.p.).

Still from the analyses of Diniz and Carrazoni (2018), quality management tools favor a positive quality contribution to management. On the other hand, such tools require a qualified handling by professionals so that their application is effective in the face of the expected result. These can, according to Diniz and Carrazoni (2018, s.p.), be "Check Sheet, Histogram, Scatterplot, Stratification, Cause and Effect Diagram, Pareto Diagram and Control Charts".



Many of them are complex in their application, at least for the vast majority of school managers, since they do not have training in the area of administration. Some other quality tools are taken as an option of use, such as "Brainstorming, 5W2H, Ishikawa Diagram, Pareto Diagram, 5S, GUT Matrix and PDCA Cycle" (Diniz & Carrazoni, 2018, s.p.).

Understanding that the social function of the school is to form human consciousnesses, the aspect of quality emerges to inform how this function will be developed – or organized, structured. And this can be raised through the application of quality tools such as the PDCA cycle, which are easily found in various organizations fostering better management performance.

The PDCA (*Plan-Do-Check-Act*) cycle is a quality management methodology that aims at the continuous improvement of an organization's processes, products, and services. The cycle consists of four stages (Chiavenato, 2015):

- a) *Plan* : Define the objectives and goals to be achieved, identify the processes involved, establish performance standards, develop action plans and define performance indicators.
- b) *Do* : Execute the action plan, following the activities and processes defined previously.
- c) *Check* : Evaluate the results obtained, comparing them with the established standards and the defined performance indicators. Identify the causes of nonconformities and points of improvement.
- Act : Take corrective and preventive actions to address nonconformities and implement improvements. It is also necessary to document the learning gained and establish new objectives and goals for the next cycle.

The PDCA cycle is a simple and effective tool for project and process management in any organization. The methodology allows the identification of opportunities for continuous improvement, the optimization of processes and the guarantee of the quality of the products and services offered to customers.

The PDCA cycle is based on the premise that administrative processes can be continuously improved as it seeks to clearly show the steps to be followed in the search for a better performance of the institution. In the words of Maximiano (2017), its use by school management can improve administrative processes, promoting more effective management since it would cut waste of time, increase productivity and, consequently, raise quality.

Briefly, the planning process via the PDCA cycle implies the search for some questions: "where do you want to get there?" and "how do you get there?". The causes and not the consequences of a fact or problem are sought. They are starting points, where activities and goals fit, that is, the planning itself. That said, in the "P" phase it is worth considering the application of the 5W2H spreadsheet, which is also known as 4Q1POC, a method that is configured



as a tool that provides assistance for the planning of actions to be developed by a given institution. The tool consists of a report in the form of columns, each accompanied by a title, English words: Why, What, Who, When, Where, How and How Much (Diniz & Carrazoni, 2018, s.p.).

Thus, aiming at the execution of a more assertive action plan, the 5W2H spreadsheet aligns with the PDCA cycle supporting the formation and execution of the plan. After all, it diagnoses the problems related to filling the gaps and seeks alternatives to solve them, "facilitating understanding through the definition of methods, deadlines, responsibilities, objectives and resources" (Diniz & Carrazoni, 2018, s.p.). In this way, it describes a specific problem that guarantees success or drives a new plan – the repetition of the "P" phase.

The organization process, in turn, establishes what are the primordial activities, so that the objectives are outlined. After this phase, school management, in the stages that follow, emerges as those who guide people and sectors in their activities at the same time as verifying, that is, "have a comparative character, which is represented in the constant analysis between what the organization planned and what it actually produced" (da Silva; Oliveira & de Sá Filho, 2019, p. 5).

It is perceived that, with the implementation of the PDCA cycle combined with the 5W2H tool, the goals, resources (physical and human structures) and routes and correction of routes throughout the process towards improving the quality of routines and teaching in public schools would be more precisely.

The tool of the PDCA cycle applied in school management implies, then, the possibility of adapting or transforming the school curriculum from the constant (re)ordering of administrative, structural and pedagogical structures, with the aim of making them coherent with the reality of the students and what the school still has to offer. Thus, it is appropriate to reevaluate activities, readjust infrastructure, evaluate pedagogical practices and teacher performance, designing, therefore, quality control of education – continuous process, as the grammar of the PDCA tool institutes.

4 FINAL CONSIDERATIONS

Finally, it was reached the understanding of the real relevance of quality control tools for school management, here more specifically the PDCA cycle added to the 5W2H tool and that have a fundamental role in structuring the organization of the school institution with positive reflexes, either in the teaching processes, or in the physical and human infrastructure. It is always necessary, therefore, to adjust what the demands of the teaching unit are, to meet their needs. This time, one cannot avoid making an accurate diagnosis to plan, execute, continuously check and, when necessary, reorient routes.

It is believed that, from the study of the quality control method exposed in this article, the public educational institution will be able to mitigate its challenges, directly and positively impacting its



students and the entire society that depends on it. The 5W2H tool incorporated into the PDCA cycle has the premise of guiding the tasks of the entire school team in a punctual and directive way, avoiding waste of time and resources, since each actor involved in the work of the school will know, exactly, what their obligations are and when and how to carry them out.

It should be noted, then, that school management, to effectively execute its action plans, needs to apply these quality tools, which can be selected according to the school reality. Seen a wide arsenal of tools and methodologies, the PDCA cycle and the 5W2H tool are the most accessible, which do not require financial resources and are easy to apply in school management. In addition, in this way, the management of the school is built in a collective and, especially, democratic, and participatory way, mobilizing education professionals and the entire school community that are inserted in it.

Although the study highlighted the relevance of quality control tools in school management, it is important to recognize some limitations of the present study itself. The study, because it was not carried out from its application in a school institution or in a specific context, is limited to a generalization of the results. Additional research is needed in school settings to confirm the effectiveness of quality control tools. In addition, the study needs a comparison with other approaches or tools of school management. Comparing the effectiveness of quality control tools with other strategies can provide a more comprehensive view and allow for a better understanding of their relative advantages and disadvantages. It is important to conduct a comprehensive assessment of the effects and impacts of quality control tools on improving educational processes and outcomes.

Future studies may address these limitations, conducting more comprehensive and comparative research in different school institutions, considering various aspects of educational processes, and evaluating the results achieved by the implementation of quality control tools. In addition, it is important to investigate the challenges and obstacles faced during the application of these tools and propose strategies to overcome them, thus promoting effective and quality school management.



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