

WHAT A PRINCIPAL DOES: AN INTEGRATIVE ANALYSIS FOR THINKING ABOUT INDICATORS AND COMPETENCIES IN SCHOOL MANAGEMENT

O QUE FAZ UM DIRETOR: UMA ANÁLISE INTEGRATIVA PARA SE PENSAR OS INDICADORES E AS COMPETÊNCIAS NA GESTÃO ESCOLAR

LO QUE HACE UN DIRECTOR DE ESCUELA: UN ANÁLISIS INTEGRADOR PARA REFLEXIONAR SOBRE LOS INDICADORES Y LAS COMPETENCIAS EN LA GESTIÓN ESCOLAR



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ABSTRACT: This study investigates the relationship between indicators and core competencies for school principals, with a focus on the administrative sphere. It seeks to understand the relevance of this relationship in the role of the school principal and how they can be identified and developed to promote the success of educational institutions. Using the Prisma methodology, 245 articles on the subject were analyzed in various databases. After the initial analysis, 79 articles were selected for full reading, and of these, 11 were discussed in depth. The research reveals that school principals play a crucial role in diagnosing and planning school management according to various indicators, facing up to contemporary educational challenges. However, there is a need to improve indicators and skills in order to promote continuous improvements in education. As a result of the article, tables and a taxonomy of competencies derived from the research are proposed, which can be useful when defining the role expected of the school principal.

KEYWORDS: School Management. Competencies. Indicators. Administration.

RESUMO: Este estudo investiga as relações entre indicadores e as competências essenciais para os diretores escolares, com foco no âmbito administrativo. Busca-se compreender a relevância dessa relação no papel do diretor escolar e como podem ser identificadas e desenvolvidas para promover o sucesso das instituições de ensino. Utilizando a metodologia Prisma, foram analisados 245 artigos sobre o tema em diversas bases de dados. Após as análises iniciais, selecionou-se 79 artigos para leitura completa e, destes, 11 foram debatidos de maneira aprofundada. As pesquisas revelam que os diretores escolares desempenham papel crucial no diagnóstico e planejamento da gestão escolar conforme diversos indicadores, enfrentando os desafios educacionais contemporâneos. No entanto, é necessário aprimorar os indicadores e competências para promover melhorias contínuas na educação. Como resultado do artigo, propõem-se tabelas e uma taxonomia de competências derivadas da pesquisa, as quais podem ser úteis ao se definir o papel esperado do diretor escolar.

PALAVRAS-CHAVE: Gestão Escolar. Competências. Indicadores. Administração.

RESUMEN: Esta investigación estudia la relación entre los indicadores y las competencias esenciales para los directores de escuelas, con énfasis en la esfera administrativa. Busca comprender la relevancia de esta relación en el papel del director y cómo pueden ser identificadas y desarrolladas para promover el éxito de las instituciones educativas. Utilizando la metodología Prisma, se analizaron 245 artículos sobre el tema en diversas bases de datos. Tras los análisis iniciales, se seleccionaron 79 artículos para su lectura completa y, de ellos, 11 se analizaron en profundidad. La investigación revela que los directores de escuela desempeñan un papel crucial en el diagnóstico y la planificación de la gestión escolar en función de diversos indicadores, haciendo frente a los desafíos educativos contemporáneos. Sin embargo, es necesario mejorar los indicadores y las competencias para promover mejoras continuas en la educación. Como resultado del artículo, se proponen tablas y una taxonomía de competencias derivadas de la investigación, que pueden ser útiles a la hora de definir el papel que se espera del director escolar.

PALABRAS CLAVE: Gestión escolar. Competencias. Indicadores. Administración.

Introduction

The theme of competencies, initially emphasized in the business sector, gains prominence when considering the profound transformations in the world of work. It is observed that advancements in technological innovations and the phenomenon of economic globalization have generated significant impacts on the business landscape, compelling organizations to continuously adapt their strategies (Santos, 2014). In this context, within the educational setting, terms such as metrics, evaluators, and indicators emerge as crucial tools in school management, aiming to identify and develop competencies aligned with the demands of each role in the daily life of the school. The dynamics resulting from this process are characterized by flexibility, uncertainty, transience, and transversality, delineating an increasingly complex and multifactorial work environment (Pichai, 2010).

Based on this premise, the present research will discuss the competencies necessary for the contemporary school principal, focusing on the administrative axis. This focus encompasses decisions related to leadership, people and resource management, and the construction of metrics, scopes, and indicators, among other administrative management tools. To enhance the scope of this research, two additional studies are planned for the future, focusing on the pedagogical and ethical-moral axes. These further investigations will broaden the discussions that, in this article, are concentrated on the administrative/leadership axis.

In light of this, the research will concentrate on investigating the essential competencies, specific skills, and behavioral characteristics necessary for a school principal to effectively perform their duties in the contemporary context, with a specific focus on the administrative axis, including leadership, management, and administrative oversight. The discussion is fundamentally tied to the new demands brought about by the current need for metrics, quality indicators, and a strategic management approach increasingly required of principals in their roles.

With this in mind, we first need to determine what we understand by competencies and metrics in order to outline our discussion in search of a more focused response. Additionally, before addressing the methodology itself, it is necessary to define who the school principal is.

What are competencies, and who is the principal?

The contemporary school principal is called upon to perform a variety of multifaceted roles, ranging from leader, educator, and values cultivator to negotiator and pedagogical, social, and political mediator. This implies the need to acquire and develop a broad range of competencies to face the complex and dynamic challenges of the current educational environment (Menslin, 2012). According to Alonso (2002), it is the principal's role to establish a link between "means and ends" to solve educational and administrative problems in the school. Addressing these issues, with constant data and evaluations, is essentially about metricizing the progress of such endeavors. It is in this sense that we see the need for developing indicators that demonstrate the evolution of the educational process in a broad and objective manner, as much as possible (Johnson; Clark, 2021).

This reality is justified by the fact that administrative work gains significance from pedagogical activities, which constitute the core activities or fundamental purposes of the school organization. In other words, the teaching-learning process must be guaranteed as an essential part of the school principals' roles. Learning is what needs to be delivered at the end of the process under the leadership of the school principal. To achieve this, it is necessary to manage resources, processes, and people in both lines of action (whether in teaching or learning). Therefore, the principal must have or develop certain competencies and qualities (Frederico, 2022).

In the discussion of competencies, one of the pioneers was McClelland (1973), whose work marked the beginning of the debate on the topic among psychologists and administrators in the United States. Fleury and Borini (2010) defined competencies as an interconnected set of knowledge, skills, and attitudes that significantly impact an individual's activity. They are directly related to performance and can be measured according to predefined standards (Soares; Andrade, 2005). Additionally, one of the assumptions is that competencies can be enhanced through continuous training and development.

The growing interest in this topic arises from the recognition that the traditional model of people management is inadequate to meet the new needs and expectations of this ever-evolving scenario (Garcia, 2013). In contemporary times, the concept of competency is approached in various ways and across multiple spheres, as highlighted by Ruas *et al.* (2005). According to this author, the foundational triad of "C.H.A" (knowledge, skill, and attitude) emerges, incorporating cognitive, technical, and behavioral aspects in a broader way to determine what is expected to be delivered by each professional.

In the educational field, with the purpose of establishing guidelines and references for school management, as well as reconfiguring the role of the school principal towards the development of leadership competencies aligned with contemporary realities, it is worth noting the approval in 2021 by the Basic Education Chamber of the National Council of Education of the National Common Base of Competencies for School Principals, the BNC School Principal (Brasil, 2021). It is important to observe that, although not yet definitively ratified, this document marks a significant advancement in the field of education. In the argumentation that underpins the BNC School Principal, the document states that

[a] The matrix presented aims to parameterize the various aspects related to the role of school leadership, assisting in defining national, state, and municipal policies directed toward their initial and ongoing training, selection, monitoring, and performance evaluation (Brasil, 2021, p. 4, our translation).

Given the nature of competencies, the proposed matrix reveals the inclusion of 10 general competencies and 17 specific competencies, distributed across four crucial dimensions: political-institutional, pedagogical, administrative-financial, and personal and relational. The BNC School Principal seeks to provide a reference for the training and performance of school principals, considering contemporary demands and the complexities of the educational environment. This initiative aims not only to strengthen administrative skills but also to promote a more comprehensive approach, integrating pedagogical, political, and personal aspects into the training of these leaders (Prado; Silva; Silveira, 2012).

Such an approach sheds enlightening light on the present work, providing substantial grounding for the topic under discussion. The document not only outlines the necessary competencies for effective management but also provides a solid foundation for critical and in-depth analysis of educational leadership practices, thereby enriching the scope of the research in question. Moreover, it supports the significant possibility of aligning metrics and indicators with a process that considers the competencies of the C.H.A. triad (knowledge, skills, and attitudes) as a fundamental way to think about management and administrative processes related to school leadership. This is, without a doubt, one of the assumptions of the present work.

Having defined what indicators/metrics are and what competencies are, and understanding that they, in our definition, operate based on the logic of the C.H.A. triad (knowledge, skills, and attitudes), it remains to categorically and clearly define who the school principal is. We can refer to the definition found in the BNC School Principal:

The school principal is responsible for coordinating the development and implementation of the school's pedagogical proposal, ensuring that each teacher's work plan is followed, liaising with families and the community, and leading efforts to establish actions aimed at promoting a culture of peace, making the school a safe and pedagogically rich environment. In this regard, while respecting and assisting in the development of democratic management norms within the educational network or system, the principal must ensure the participation of school professionals in creating the political-pedagogical project, as well as the involvement of the school and local communities in the school council. Therefore, the principal's role is crucial in ensuring a quality public school for everyone (Brasil, 2021, p. 4, our translation).

As noted, the BNC School Principal defines the school principal as the professional responsible for managing the school and fostering coordination among various dimensions of educational practice. This role includes coordinating pedagogical and administrative activities, managing resources, and maintaining relationships with the school community. This definition underscores the importance of adequate training to ensure the necessary competence to face the challenges of contemporary education. Although the discussion in the BNC School Principal pertains to public schools, this aspect can be extended to any educational unit, whether public, private, or confessional (Sousa, 2020).

Having established these considerations and definitions, we now turn to the methodology of this study. As previously mentioned, the aim is to discuss the essential competencies, specific skills, and behavioral characteristics required for a school principal to effectively perform their duties in the contemporary context, with a specific focus on the administrative axis, including leadership, management, and administrative oversight. But how will we achieve this? This concern will be addressed in the next section.

Methodology, Steps, and Guidelines

The methodological approach initially adopted relies on Integrative Review (IR), an approach that allows for a holistic and comprehensive understanding of the topic (Günther, 2006). Integrative review is a proposal that enables the synthesis of knowledge, integrating the applicability of results from significant studies into practice (Souza; Silva; Carvalho, 2010). In this context, the focus is on exploring and investigating the competencies related to school leadership. The approach aims to provide a comprehensive and holistic view of the subject. According to Souza, Silva, and Carvalho (2010), the integrative review is a method that promotes the incorporation of results' applicability and the synthesis of relevant knowledge into practice (Oliveira *et al.*, 2023).

Given the need to ensure practice grounded in scientific evidence, the Integrative Review has been identified as a unique tool, as it synthesizes available research on a specific topic and directs practice based on scientific analysis (Souza; Silva; Carvalho, 2010). As highlighted by Brandão, Silva, and Almeida (2022), systematic review is widely recognized as a more rigorous research method aimed at identifying, separating, collecting data, investigating, and describing relevant benefits to research in a more detailed and controlled manner. Such methodological approaches not only provided robustness to this study but also offered a solid foundation for interpreting and discussing the obtained results, as seen in Souza, Silva, and Carvalho (2010).

The methodology adopted follows the guidelines of the Prisma methodology (Preferred Reporting Items for Systematic Reviews and Meta-Analyses), as proposed by Galvão, Pansani, and Harrad (2015). It establishes a four-step flowchart: identification, selection, eligibility, and inclusion. This structured approach offers transparency and rigor to the review process, ensuring a systematic and unbiased analysis of the identified sources (Ercole; Melo; Alcoforado, 2010). The Prisma methodology is widely recognized for conducting and reporting systematic reviews and meta-analyses (Bueno; Batista; Trabbold, 2017).

The method of identifying, selecting, evaluating, and including materials in academic work is a meticulous process (Galvão; Pansani; Harrad, 2015), starting with defining the topic and searching academic databases. Selection involves transparent criteria, followed by a thorough screening. Eligibility assesses whether the materials meet educational requirements, considering credibility and currency. Inclusion involves thematically organizing the materials, applying citations and references according to citation and cataloging standards, and ensuring robustness and compliance with academic work. In data analysis, we opted for a planning approach as a reference tool, enhancing data extraction and providing greater reliability to the analyzed topic.

After the detailed analysis described above, it was possible to construct a table of broader competencies derived from each of the selected and analyzed articles. With each table completed, we were finally able to propose a unification of similar competencies and include as many variables as possible within the administrative aspect. This resulted in a survey that goes beyond a simple literature review, emerging as a more complex task of cataloging competencies and their descriptions. To align with the objectives of this work, the Integrative Review was conducted in search of publications on indicators and school management.

Steps for the Present Research

The integrative review commenced on November 11, 2023, and was completed on May 3, 2024. We adopted a comprehensive approach, consulting major information sources, notably the Brazilian Digital Library of Theses and Dissertations (BDTD), the Capes Periodicals Portal (CAPES), the Education Resources Information Center (ERIC), and the Scientific Electronic Library Online (SCIELO). This careful selection of recognized databases (see Chart 1) broadened the research scope, ensuring a representative review of the available literature.

Chart 1 – Descriptors Used and Documents Found

Database	Documents found	Descriptor	Field
BDTD	4	Indicators AND school management	Subject
CAPES	188		Subject
SCIELO	11		Subject
ERIC	42		Subject

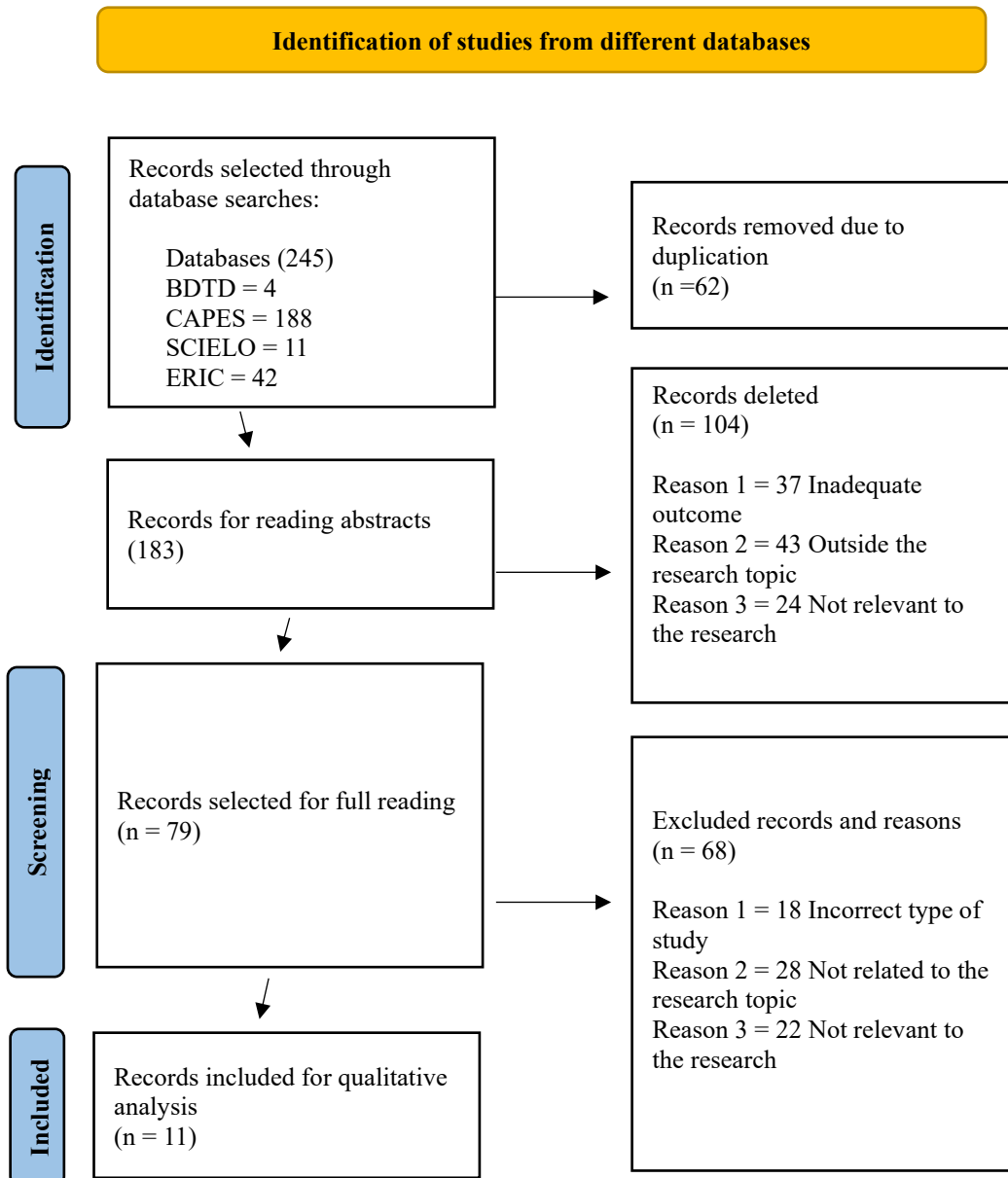
Source: Prepared by the authors (2024).

Upon initiating the exploration of databases, a broad set of 245 materials was initially identified, including articles, dissertations, and theses. After removing duplicates, 183 documents remained for further analysis. Of these, 104 were excluded: 37 due to inadequate outcomes, where the articles did not directly address the research question or were not relevant to the study's objectives; 43 were outside the thematic scope, although related to education, focusing on areas distinct from those explored in our investigation; and 24 were excluded for lacking direct relevance to the research, not addressing the core issues.

As mentioned above, during the analysis process, it was necessary to exclude topics not aligned with the research objectives, such as "School Performance Indicators," "Health Indicators," "Student Achievement," "IDEB and ENEM Statistics," and "Analysis Between Public and Private Schools." This exclusion was crucial to maintain the relevance and focus of the review. It is important to emphasize that while these topics are of significant importance, the scope of this study focuses on the competencies required for directors to effectively perform their roles.

After this screening, 79 articles were pre-selected for a more detailed evaluation. Subsequently, a thorough analysis allowed for the qualification of 11 articles for inclusion in the review. The entire process is illustrated in Figure 1 below.

Figure 1 – Screening and Selection of Documents Using the Prisma Methodology



Source: Prepared by the Authors, based on Galvão, Pansani, and Harrad (2015).

In analyzing Chart 1, Figure 1 (above), and Chart 2 (below), we observe the correlation between the essential competencies of school directors highlighted in the literature and the administrative management practices applied in various educational contexts concerned with some form of measurement or quality indicator. This correlation allows us to identify how the theoretically described competencies are applied in daily practice, providing a more holistic view of the demands and challenges faced by school directors. By integrating the information from these tables, we are able to outline a more comprehensive and in-depth overview of the competencies necessary for effective school management.

Chart 2 – Methodologies and General Description of Findings

1. **Work:** Lima (2021)

Title: *Seleção de diretores e o sentido da gestão escolar: percepções de diretores sobre o plano de gestão.*

Type of Study: Qualitative and quantitative.

Instruments Used: Documentary bibliographic research and semi-structured interviews.

Country: Brazil.

Main Findings: It was discovered that, despite varying perceptions, directors play a crucial role in diagnosing and planning management in response to new educational challenges.

2. **Work:** Alves (2017)

Title: *Informação estratégica: indicadores educacionais e os órgãos de fomento.*

Type of Study: Qualitative (descriptive typology).

Instruments Used: Documentary research and content analysis.

Country: Brazil.

Main Findings: It was shown that educational indicators need to be expanded to facilitate improvements in contemporary education.

3. **Work:** Thums (2015)

Title: *Práticas da Gestão e cultura escolar: um estudo de caso na Escola Municipal Santos Anjos.*

Type of Study: Qualitative.

Instruments Used: Observation, interviews, and documents.

Country: Brazil.

Main Findings: Relevant variables such as organizational climate, school culture, and a welcoming environment were discovered. These aspects directly influence the daily operations and effective functioning of the school.

4. **Work:** Cangue (2020)

Title: *Liderança nas escolas de magistério em Angola.*

Type of Study: Qualitative.

Instruments Used: Questionnaires and interviews.

Country: Angola.

Main Findings: It was demonstrated that there are few democratic and collaborative models in the country's education system, which directly impacts school leadership profiles.

5. **Work:** Curi and Souza (2015)

Title: *Medindo a qualidade das escolas: evidências para o Brasil.*

Type of Study: Qualitative/Quantitative.

Instruments Used: Data and analysis were used.

Country: Brazil.

Main Findings: The results show that the ranking of schools based on quality indicators differs from the ranking based on proficiency indicators. Furthermore, the ranking based on quality indicators is less unstable compared to the ranking obtained from pure value-added indicators. In other words, the classification of schools using the quality indicators proposed in the study differs from that based solely on traditional student proficiency indicators. Additionally, the quality-based ranking is more consistent and less prone to year-to-year fluctuations compared to rankings using only value-added indicators, which are sensitive to small variations and may not accurately reflect the school's actual contribution to student performance.

6. **Work:** Fisher *et al.* (2017)

Title: *Competências do diretor escolar para uma gestão autônoma e democrática em escolas públicas: estudo na educação básica em município catarinense.*

Type of Study: Qualitative.

Instruments Used: A case study.

Country: Brazil.

Main Findings: It was found that most directors do not create differentiated activities in schools due to limitations in the academic calendar.

7. **Work:** Souza, Oliveira and Carvalho (2023)

Title: *Como os estados e os municípios capitais no Brasil regulamentam as competências do diretor escolar.*

Type of Study: Qualitative/Quantitative.

Instrument Used: Data analysis.

Country: Brazil.

Main Findings: The findings show that most of the federated entities analyzed have legislation regulating the role of school principals.

8. **Work:** Vieira and Vidal (2019)

Title: *Liderança e gestão democrática na educação pública brasileira.*

Type of Study: Qualitative/Quantitative.

Instrument Used: Data analysis.

Country: Brazil.

Main Findings: The topic of leadership, as it is configured in other contexts, constitutes a latent demand in Brazilian educational policy.

9. **Work:** Aguiar, Ruiz and Silva (2022)

Title: *A tendência política da matriz nacional de competências para os diretores escolares e o nascimento de uma proposta sociopolítica.*

Type of Study: Qualitative/Quantitative.

Instruments Used: Bibliographic research and document analysis.

Country: Brazil.

Main Findings: The study argues that the document prepared by the Ministry of Education (MEC) does not adequately meet the formative requirements necessary for the adequate performance of the role in school management. This finding indicates that the definition of school principals' competencies extends beyond purely educational considerations, involving broader political and social implications.

10. **Work:** Delgado *et al.* (2022)

Title: *Qual o papel do conselho geral na gestão das escolas públicas portuguesas? Percepções dos diretores.*

Type of Study: Qualitative/Quantitative.

Instruments Used: Exploratory interviews and questionnaires.

Country: Portugal.

Main Findings: The study highlights that directors of Portuguese public schools recognize the General Council as a crucial element in defining educational policies and strategies. This underscores the relevance of this body in school management, as its active participation is fundamental for establishing guidelines that promote teaching quality and guide the effective functioning of the institution.

11. **Work:** Alveas and Ghedine (2022)

Title: *Gestão por competência em uma rede de educação básica confessional.*

Type of Study: Qualitative.

Instrument Used: A case study.

Country: Brazil.

Main Findings: The analysis highlights the need for a cautious approach when generalizing results due to the uniqueness of the studied context. Additionally, it emphasizes the importance of future research addressing specific organizational competencies for confessional education networks. Lastly, it underscores the relevance of adapting competency-based management practices to the characteristics and values of religious institutions, as well as seeking a humanized approach to people management.

Source: Prepared by the Authors (2024).

With the development completed and the results discussed above, we can now move on to a more detailed discussion of the issues raised at the beginning of this work. Specifically, what are the essential competencies, specific skills, and behavioral characteristics necessary for a school principal to effectively perform their duties in the contemporary context, with a particular focus on the administrative axis, including leadership, management, and administrative oversight? At this stage, the goal is not to develop a process that provides a definitive answer to the formulated question. Instead, the aim is to explore existing academic literature to identify pathways that may assist in the pursuit of such an answer. This is precisely what will be addressed next.

From the review of all previously mentioned materials, a list of terms related to the competencies discussed was created, drawn directly from the literature analysis. As previously stated, we consider competencies as a set of knowledge, skills, and attitudes (the K.S.A. triad) that an individual possesses, which are fundamental for performing tasks or operating in professional and social contexts. They represent the ability to mobilize these internal resources in an integrated manner, aiming to solve specific problems and achieve concrete objectives. This concept serves as a tool to decompose and understand competencies in three complementary dimensions. Following the same logic as Behar (2013), we define these broad categories of competencies as follows:

1. **Knowledge:** Refers to the theoretical understanding a person has about a particular subject, including information, facts, concepts, theories, and principles learned through courses, training, or experience.
2. **Skill:** Involves the ability to apply knowledge practically to perform tasks and solve problems. It includes technical and intellectual competencies developed through practice and experience.

- 3. Attitude:** Encompasses behaviors, values, and ways of thinking that influence how a person interacts with others and their environment. Attitudes directly affect an individual's motivation and commitment.

To categorize and create categories within the framework of the K.S.A. triad, it is essential to clearly define what each dimension must encompass to be effective (quality indicator). To define knowledge, it is necessary to identify which information is crucial for the competency in question and establish levels of depth and breadth of the required knowledge. For skills, it is necessary to describe the practical actions that demonstrate the application of expertise, specifying how these skills can be exhibited or measured. Regarding attitudes, it is required to outline the expected behaviors, essential values, and relevant predispositions (which, although more subjective, can indeed be quantified and qualified in the form of indicators).

This approach has allowed us to construct a more structured evaluation of individual competencies, facilitating the identification of development gaps and the creation of specific action plans for continuous improvement in the three areas of the K.S.A. With this in mind, we can now outline the competency matrix that emerged from the texts analyzed here. In this regard, we followed the same logic presented by Behar (2013) when constructing and presenting the tables. First, we have the competency itself, then its general description, and finally, the K.S.A. and its description.

Regarding competencies: What would they be?

After a thorough analysis and the initial exclusions based on the evaluation of titles, abstracts, and full texts, following the criteria previously presented, the 11 selected studies exhibit the following characteristics: 9 of these studies were conducted in Brazil, featuring contributions from renowned researchers such as Lima (2021); Alves (2017); Thums (2015); Curi and Souza (2015); Fisher *et al.* (2017); Souza, Oliveira, and Carvalho (2023); Vieira and Vidal (2019); Aguiar, Ruiz, and Silva (2022); and Alveas and Ghedine (2022). Two studies were conducted outside the country, one in Angola, by Cangue (2020), and another in Portugal, authored by Delgado *et al.* (2022).

Regarding the study's outline, it is relevant to highlight the presence of two qualitative research studies and four that adopted a qualitative/quantitative approach. The methodological diversity in this set of studies significantly contributes to a heterogeneous and comprehensive

view of the analyzed topic (Brandão; Costa; Oliveira, 2022). The combination of qualitative and quantitative methods suggests a holistic approach to investigating the competencies related to school leadership, allowing for a more complete and multifaceted understanding.

Such methodological diversity strengthens the validity and relevance of the results, providing valuable insights into the competencies required in this context. Regarding the study's outline, it was observed that three of the studies adopted a qualitative approach, while two employed a qualitative/quantitative approach. One of them utilized Descriptive Typology, a classification method that organizes objects, concepts, phenomena, or elements based on observable characteristics and/or attributes. It is important to note that this approach does not focus on explaining cause-and-effect relationships between categories but instead seeks to create groups based on similarities and differences.

The methods employed in the studies showed significant diversity, reflecting the breadth of research in the field of school management. For instance, in Lima (2021), the research adopted a comprehensive approach, utilizing bibliographic, documentary research, and semi-structured interviews. This methodological combination allowed for a more complete analysis of directors' perceptions regarding management plans. Bibliographic and documentary research provided a solid theoretical foundation, while semi-structured interviews enabled a deeper understanding of the nuances and challenges faced by directors in the process of developing the plan. The central aim of this research was to explore directors' perceptions in key areas such as diagnosis, self-assessment, goal setting, and propositions. These elements are fundamental to the development of effective school management. By highlighting the distinct perceptions and reactions of school leaders, the study not only provided valuable insights into the implementation of the management plan but also underscored the complexity of these leadership roles. The competencies that we were able to identify from such a reading are presented in Table 1 below.

Table 1 – Competencies, Skills, and Attitudes (K.S.A.) of School Directors

Competence	Description	Knowledge	Skills	Attitudes	Based on
<i>Participative Management</i>	Ability to engage the school community in management and decision-making.	Knowledge of democratic and inclusive management.	Facilitate active participation; mediate conflicts.	Open, inclusive, collaborative.	Lima (2021).
<i>Strategic Planning</i>	Develop and implement strategic plans focused on clear educational goals.	School planning and administration.	Set realistic goals; monitor progress.	Forward-thinking, proactive.	
<i>Adaptive Leadership</i>	Adapt to various situations and needs of the school and the community.	Leadership theories; organizational change.	Lead in dynamic and diverse environments.	Flexible, resilient.	
<i>Technical Competence</i>	Effective use of educational indicators to improve the school.	Data analysis and evaluation of educational performance.	Analyze and apply data for informed decision-making.	Data-driven, meticulous.	
<i>Effective Communication</i>	Clearly communicate policies, plans, and visions to all stakeholders.	Strategic communication and stakeholder management.	Communicate effectively in various formats and contexts.	Transparent, approachable, persuasive.	
<i>Autonomy and Initiative</i>	Independence in management and initiative to implement improvements.	Autonomy in management and decision-making processes.	Make autonomous decisions; initiate improvement projects.	Independent, self-motivated.	

Source: Prepared by the Authors (2024).

In the research conducted by Alves (2017), data were obtained through documentary research and content analysis. This study also employed the Descriptive Typology mentioned above. The aim was to provide school stakeholders with the ability to utilize educational indicators, thereby contributing to the improvement of educational indices. This approach seeks not only to understand the data but also to apply it practically in the educational context. The emphasis is on the importance of enabling school stakeholders to make use of educational indicators to help improve educational indices. Therefore, the text addresses aspects of data collection and analysis relevant to decision-making and improvements in the context of school management. See the competencies that were cataloged from such discussions in Table 2.

Table 2 – Competencies, Skills, and Attitudes (C.H.A) of the School Principal

Competence	Description	Knowledge	Skills	Attitudes	Based on
<i>Strategic Use of Indicators</i>	Ability to use educational indicators to improve school management.	Knowledge of various educational indicators and their interpretation.	Analyze and apply indicators for planning and continuous improvements.	Analytical vision, proactive.	Alves (2017).
<i>Data-Based Management</i>	Use data to support management decisions and improve educational quality.	In-depth understanding of data analysis and evidence-based decision-making.	Integrate performance data into the school's daily management.	Results-oriented, decisive.	
<i>Effective Communication</i>	Clearly communicate school objectives and needs to internal and external stakeholders.	Effective communication techniques, especially in formal contexts.	Clearly articulate needs and goals.	Transparent, confident.	
<i>Strategic Planning</i>	Develop and implement long-term plans based on indicator analysis.	Strategic planning and educational management.	Create and maintain strategic plans aligned with educational indicators.	Forward-looking, organized.	

Source: Prepared by the Authors (2024).

In the research conducted by Thums (2015), techniques such as observation, interviews, and document analysis were employed. The central objective of this study was to identify the variables that characterize different types of management, exploring the implications of local culture on management processes. The focus was dual: understanding the distinct management approaches and examining how the city's culture impacts these administrative processes. We observe the correlation between the city's culture and its influence on management practices in educational contexts. Table 3 details the competencies that we were able to infer from this discussion.

Table 3 – Competencies, Skills, and Attitudes (C.H.A) of the School Principal

Competence	Description	Knowledge	Skills	Attitudes	Based on
<i>Integrated Cultural Management</i>	Understanding and integrating school and community culture into educational management.	Local and school culture, community practices.	Integrate cultural values into curriculum and school practices.	Respect for cultural diversity and inclusiveness.	Thums (2015).
<i>Collaborative Leadership</i>	Promoting a collaborative and inclusive environment that engages teachers, students, and the community.	Collaborative leadership theories, community engagement.	Facilitate collaboration among diverse stakeholders.	Empathetic, communicative, inspiring.	
<i>Strategic Resource Management</i>	Efficient allocation and use of resources to promote quality education.	Resource management, strategic planning.	Plan and allocate resources effectively.	Proactive, responsible, innovative.	
<i>Continuous Assessment and Improvement</i>	Implementation of assessment systems that promote continuous improvement.	Educational assessment, performance analysis.	Develop and implement assessments for continuous improvement.	Results-oriented, analytical.	
<i>Community Partnerships</i>	Development of strategic partnerships with the community and other institutions.	Community relations.	Build and maintain strong partnerships with external stakeholders.	Engaged, visionary, collaborative.	

Source: Prepared by the Authors (2024).

Cangue's (2020) study utilized questionnaires and interviews to analyze the management profiles in the Teacher Training Schools of Angola. The research acknowledged its limitations, emphasizing that the goal was not to generalize the results but to reveal the leadership situation in these schools and provide valuable contributions to the understanding of the Angolan educational system. Therefore, while the article focuses its analysis on management profiles within a specific context, it also offers comparative insights relevant to school management. The competencies identified from this study are listed in Table 4 below.

Table 4 – Competencies, Skills, and Attitudes (C.H.A) of the School Principal

Competence	Description	Knowledge	Skills	Attitudes	Based on
<i>Democratic Leadership</i>	Ability to adopt a leadership style that promotes participation and active involvement.	Theories of democratic leadership.	Foster active participation and shared decision-making.	Open, inclusive, collaborative.	Cangue (2020).
<i>Communicative and Social Competence</i>	Ability to communicate and interact effectively with the school community.	Effective communication and social relations.	Establish clear and effective communication, mediate, and facilitate dialogues.	Empathetic, approachable, persuasive.	
<i>Emotional Competence</i>	Manage one's own emotions and understand those of others to improve the school climate.	Emotional intelligence.	Regulate emotions in stressful contexts and promote a positive environment.	Resilient, calm, motivating.	
<i>Resource Management</i>	Efficient distribution and use of educational resources to maximize the quality of teaching.	Resource management.	Optimize the allocation of resources and supervise their effective use.	Responsible, efficient, and innovative.	
<i>Practices of Democratic Values</i>	Promote and practice democratic values within the school, such as equality and justice.	Democratic values and ethics.	Implement policies and practices that reflect these values.	Fair, ethical, and committed to educational reform.	

Source: Prepared by the Authors (2024).

The research conducted by Curi and Souza (2015) adopted a methodological approach that integrated qualitative and quantitative methods for data collection and analysis. The study aimed to examine the ranking of schools based on quality indicators, comparing these results with the ranking obtained from proficiency indicators at the school level. The research findings revealed disparities between the school rankings when considering quality indicators versus proficiency indicators.

In this context, the analysis indicated the need to develop an indicator that more comprehensively reflects the quality of the school, taking into account various school factors. It is important to emphasize that the combined approach of qualitative and quantitative methods enriched the understanding of the topic, allowing for a more comprehensive and well-founded

analysis of the results presented. The diversity of methods employed in the studies reveals a comprehensive approach to understanding the competencies necessary for the performance of school principals in basic education. The competencies we were able to list from this reading are found in Table 5 below.

Table 5 – Competencies, Skills, and Attitudes (C.H.A) of the School Principal

Competence	Description	Knowledge	Skills	Attitudes	Based on
<i>Educational Data Management</i>	Use of quality indicators to assess and improve school management.	Educational statistics; measurement and evaluation methods.	Analyze data to identify areas for improvement.	Proactive in seeking improvements; attention to detail.	Curi and Souza (2015).
<i>Adaptive Leadership</i>	Adaptation to new assessment methods and continuous improvement of educational quality.	Leadership theories; change management.	Implement adaptive strategies for continuous improvement.	Openness to change; commitment to educational excellence.	
<i>Focus on Student Achievement</i>	Prioritization of improving student performance through data-driven interventions.	Performance assessment; pedagogy.	Develop and implement strategies to enhance learning.	Results-oriented; empathy.	
<i>Transparency and Communication</i>	Effective communication of indicator results to all stakeholders.	Communication; public relations.	Clearly articulate policies and outcomes to the community.	Transparency; ability to engage	
<i>Professional Development</i>	Promotion of professional development of teachers as a means of improving the quality of education.	Staff development; training techniques.	Facilitate development opportunities for staff.	Support professional growth; inspirational.	

Source: Prepared by the Authors (2024).

In the study conducted by Fisher *et al.* (2017), a qualitative case study methodology was adopted. This approach aimed to deeply analyze the essential competencies required of school principals, with a focus on developing autonomous and democratic management. The choice of a qualitative approach provided a richer and more contextualized understanding of the practices and challenges faced by school managers, allowing for a detailed analysis of the competencies

that influence management effectiveness. The competencies we were able to list from this reading are found in Table 6 below.

Table 6 – Competencies, Skills, and Attitudes (C.H.A) of the School Principal

Competence	Description	Knowledge	Skills	Attitudes	Based on
<i>Democratic and Autonomous Management</i>	Ability to lead the school autonomously, promoting active participation.	Principles of democratic management and school autonomy.	Implement participatory practices and make inclusive decisions.	Open, inclusive, and committed to equity.	Fisher <i>et al.</i> (2017).
<i>Conflict Resolution</i>	Ability to mediate conflicts and facilitate communication between all involved	Mediation and conflict resolution techniques.	Mediate disputes, promote dialogue, and maintain a harmonious environment.	Empathetic, calm, resilient.	
<i>Adaptation and Flexibility</i>	Adapt to changes in the school environment and in the community.	Change management and adaptation.	Adjust management practices according to the needs of the school community.	Flexible, proactive.	
<i>Development of School Policies</i>	Formulate policies that support autonomous and democratic management.	Educational policy and legislation.	Create and implement policies that promote community participation.	Visionary, strategic.	
<i>Training and Professional Development</i>	Promote the continuous professional development of oneself and the team.	Professional development and leadership.	Organize training and growth opportunities for staff.	Inspiring, committed to personal and professional growth.	

Source: Prepared by the Authors (2024).

The approach conducted by Souza, Oliveira, and Carvalho (2023), centered on a survey of electronic portals of legislation, has direct relevance to school management. By examining pertinent legislation, the study aims to identify and understand the guidelines and regulations that guide the management of educational institutions. The comparative analysis conducted by the study highlights the similarities and differences among the cases studied, providing valuable insights into the practices and norms that influence school management in different contexts. Thus, the research contributes to a deeper understanding of the legal foundations that shape the decisions and actions of educational managers, serving as a crucial tool for the improvement of

school management in the Brazilian educational scenario. The competencies we were able to list from this reading are found in Table 7 below.

Table 7 – Competencies, Skills, and Attitudes (C.H.A) of the School Principal

Competence	Description	Knowledge	Skills	Attitudes	Based on
<i>Institutional Representation</i>	Ability to act as an official representative of the school in different contexts.	Educational legislation, institutional protocols.	Represent the school at events, meetings and before government agencies.	Communicative, professional, responsible.	Souza, Oliveira and Carvalho. (2023).
<i>Compliance with Standards</i>	Ensure compliance with educational standards and current legislation.	Educational legislation and standards.	Apply legislation in the school environment, including internal regulations.	Ethical, diligent, fair.	
<i>Promotion of Educational Quality</i>	Focus on continuous improvement of educational quality through evidence-based practices.	Educational assessment, quality improvement methods.	Evaluate and implement strategies for continuous improvement.	Results-oriented, innovative.	

Source: Prepared by the Authors (2024).

The research conducted by Vieira and Vidal (2019) presents an approach that broadens the debate on school leadership, highlighting the specificities of the Brazilian context in relation to this theme, with a particular focus on the principle of democratic management. The study proposes an in-depth analysis, exploring the evolution of the debate on democratic management from the mid-1980s to the most recent scenario. The reflection covers essential milestones, such as the Federal Constitution of 1988 and the National Education Guidelines and Framework Law – LDB (Law No. 9.394/96), emphasizing how these elements have influenced the approach to democratic management in Brazilian educational institutions (Brasil, 1988, 1996).

Furthermore, the research contextualizes the theme within the scope of the 2014 National Education Plan (PNE), identifying how democratic management is incorporated into the educational goals established during this period (Brasil, 2014). This in-depth analysis contributes to a broader understanding of the trajectory and role of democratic management in the Brazilian educational context. The competencies we were able to list from this reading are found in Table 8 below.

Table 8 – Competencies, Skills, and Attitudes (C.H.A) of the School Principal

Competence	Description	Knowledge	Skills	Attitudes	Based on
<i>Democratic Management and Political Leadership</i>	Ability to implement school management that integrates the community and democratic principles.	Principles of democratic management and political leadership.	Promote participation of the school community.	Inclusive, engaged in social justice.	Vieira and Vidal (2019).
<i>Training and Professional Development</i>	Continuous development of own management skills and the skills of teachers.	Manager training programs and professional development.	Organize and facilitate training initiatives.	Committed to personal and professional development.	
<i>Policy Analysis and Application</i>	Effective interpretation and application of educational policies to improve school management.	Educational legislation, public policies.	Apply legislation and policies in a practical way.	Analytical and aware of the impacts of policies.	

Source: Prepared by the Authors (2024).

The research conducted by Aguiar, Ruiz, and Silva (2022) scrutinized the approval of the resolution project of the National Competency Matrix for School Principals by the National Education Council (CNE). The general objective of the study was to highlight the school principals' training project directed by the mentioned resolution. This analysis aimed to underscore the implications and relevance of this project for the training and performance of school principals, considering their educational context. The competencies we were able to list from this reading are found in Table 9 below.

Table 9 – Competencies, Skills, and Attitudes (C.H.A) of the School Principal

Competence	Description	Knowledge	Skills	Attitudes	Based on
<i>Critical and Democratic School Management</i>	Ability to implement management practices that promote participation and social justice.	Critical theories in education, democratic management.	Develop and implement school policies that integrate the school community.	Committed to equity and social transformation.	Aguiar, Ruiz and Silva (2022).
<i>Transformative Leadership</i>	Lead institutional changes aimed at the continuous improvement of education.	Educational leadership, organizational change.	Inspire and motivate school staff to achieve common educational goals.	Visionary, inspiring, resilient.	
<i>Advocacy for an Emancipatory Education</i>	Advocate for an education that promotes the social and cultural emancipation of individuals.	Emancipatory pedagogy, critical theories.	Promote programs and practices that aim for empowerment through education.	Engaged and passionate about social change.	
<i>Professional Training and Development</i>	Foster continuous professional growth within the educational team.	Continuing professional development.	Organize and lead professional development initiatives.	Committed to personal and collective growth.	

Source: Prepared by the Authors (2024).

The study conducted by Delgado et al. (2022) aims to perform an in-depth analysis of the current school management model, with a particular focus on the perspective of principals, who are considered key actors in the decision-making process within educational institutions. The research seeks not only to understand the practical functioning of the management model but also to identify the interpretations and positions of principals regarding specific challenges faced in implementing this model. By concentrating on the views and experiences of principals, the study aims to provide a more comprehensive understanding of administrative and school management practices. This includes examining the established formal model and highlighting the nuances perceived by principals in relation to the obstacles encountered in the daily administration of education. Thus, the research contributes to a critical analysis of the current school management model, offering valuable insights into possible improvements and adjustments in educational policies. The competencies we were able to list from this reading are found in Table 10 below.

Table 10 – Competencies, Skills, and Attitudes (C.H.A) of the School Principal

Competence	Description	Knowledge	Skills	Attitudes	Based on
<i>Collaborative Leadership</i>	Ability to work with the general council to define and implement school policies.	Collaborative school management, educational policies.	Facilitate collaboration and communication between the school board and the general council.	Inclusive, open to dialogue.	Delgado <i>et al.</i> (2022).
<i>Compliance Management</i>	Ensure that the school complies with the guidelines set by the general council.	Educational regulations, legal compliance.	Effectively manage and resolve conflicts to maintain a harmonious school environment.	Responsible, diligent.	
<i>Mediation and Conflict Resolution</i>	Ability to mediate conflicts between different school stakeholders, including the general council.	Conflict resolution techniques, mediation.	Effectively manage and resolve conflicts to maintain a harmonious school environment.	Calm, balanced.	
<i>Strategic Advocacy</i>	Advocate for the school's interests and autonomy in interactions with the general council and other entities.	Advocacy, organizational strategy.	Navigate political complexities and advocate for resources and school autonomy.	Persuasive, proactive.	
<i>Transparency and Accountability</i>	Maintain transparent and accountable management to the general council and the school community.	Transparent management, accountability.	Effectively communicate school management decisions and actions to all stakeholders.	Transparent, honest.	

Source: Prepared by the Authors (2024).

The research conducted by Alveas and Ghedine (2022) aimed primarily to map the organizational competencies deemed relevant for a confessional basic education network. An exploratory approach with a qualitative emphasis was chosen, employing a single case study method. This study was carried out in a confessional educational network located in the southern region of Brazil. The choice of an exploratory approach highlights the intention to investigate in-depth and contextually the organizational competencies that are crucial for the specific context of confessional primary education. The qualitative nature of this research suggests a pursuit of meaningful insights and a deeper understanding of the competencies

considered essential for the effective functioning and success of this particular educational network.

By adopting the single case study method, the researchers sought a detailed and holistic analysis, allowing for an in-depth understanding of the practices, challenges, and peculiarities faced by this specific confessional educational institution. This methodological choice provides a more specific and detailed view of the internal dynamics of the educational network, contributing to a more comprehensive understanding of the organizational competencies identified within the confessional context. The competencies we were able to list from this reading are found in Table 11 below.

Table 11 – Competencies, Skills, and Attitudes (C.H.A) of the School Principal

Competence	Description	Knowledge	Skills	Attitudes	Based on
<i>Strategic Leadership</i>	Ability to direct and influence school policies and practices.	Knowledge of legal standards and the educational context.	Ability to negotiate and mediate conflicts.	Proactive decision-making and accountability.	Alveas and Ghedine (2022).
<i>Relationship Management</i>	Maintain and develop productive relationships with the board and other stakeholders.	Knowledge of community dynamics and local policies.	Ability to communicate effectively and build networks.	Openness and transparency in relationships with the community and the board.	
<i>Organizational Development</i>	Promote a school culture that reflects community values and educational goals.	Knowledge of organizational culture and change management.	Leadership in the development and implementation of educational projects.	Commitment to continuous improvement and innovation.	
<i>Accountability and Transparency</i>	Ensure accountability and transparency in school decisions and management.	Knowledge of accountability processes and legal requirements.	Ability to report and justify decisions to regulatory bodies and the board.	Integrity and ethics in resource management and institutional relations.	

Source: Prepared by the Authors (2024).

Considering the contributions from the 11 studies previously analyzed, it becomes evident that the complexity of school management extends beyond traditional metrics, encompassing crucial administrative aspects. In this context, the need for more comprehensive indicators emerges as a response to the multifaceted dynamics of contemporary educational management, which demands a holistic evaluation to foster substantial improvements in teaching quality.

In line with this discussion and as the first part of a process to identify indicators, we propose the following taxonomy (Chart3) divided into three major areas: 1) Strategic Management, 2) Professional Development and Leadership, and 3) Communication and Community Relations. This classification was created by grouping similar or complementary competencies, aiming for a holistic view that addresses everything from strategic execution to interpersonal development and community management. The significance of this division lies in its ability to provide a clear framework for discussing and developing training programs for school principals, enabling them to identify areas of strength and areas needing development. Furthermore, this organization facilitates the identification of competency gaps and aids in the formulation of more effective educational policies, promoting more efficient school management tailored to contemporary demands. The competencies listed in the taxonomy were derived directly from the list we created while constructing the previous tables. It is important to note that this list is not exhaustive or definitive but rather reflects the trends and patterns found in the literature analyzed here regarding the essential skills and capabilities of school principals.

Table 3 – Proposed Taxonomy Based on the Previous Tables

STRATEGIC MANAGEMENT

- • Strategic Planning
- • Strategic Use of Indicators
- • Data-Based Management
- • Resource Management
- • Autonomy and Initiative
- • Organizational Development
- • Compliance Management
- • Democratic and Autonomous Management
- • Relationship Management
- • Accountability and Transparency
- • Continuous Evaluation and Improvement
-

PROFESSIONAL DEVELOPMENT AND LEADERSHIP

- • Adaptive Leadership
- • Democratic Leadership
- • Transformational Leadership
- • Collaborative Leadership
- • Strategic Leadership
- • Professional Development
- • Professional Training and Development
- • Professional Training and Development
- • Technical Competence
- • Communicative and Social Competence
- • Emotional Competence

COMMUNITY COMMUNICATION AND RELATIONSHIPS

-
- • Effective Communication
 - • Participatory Management
 - • Community Partnerships
 - • Mediation and Conflict Resolution
 - • Representation Institutional
 - • Promoting Emancipatory Education
 - • Critical and Democratic School Management
 - • Integrated Cultural Management
 - • Strategic Advocacy
 - • Democratic Values Practices
 - • Transparency and Accountability
-

Fonte: Elaborado pelos Autores (2024).

Final considerations

This article has highlighted the importance of adopting an integrated approach to identify and develop the essential competencies for school principals, with a primary focus on administrative management and transformative leadership. The taxonomy developed, based on an integrative review and the inferences from the examined studies, offers a robust, albeit preliminary, framework for the training of school leadership. The listed competencies, while derived from the analyses rather than direct quotations from the original works, provide a valid and practical interpretation, reflecting the skills necessary for educational contexts.

To organize the competencies of school principals identified in 11 distinct tables, this research developed a taxonomy divided into three major areas: Strategic Management, Professional Development and Leadership, and Communication and Community Relations. This classification was achieved by grouping similar or complementary competencies, aiming for a holistic view that encompasses everything from strategic execution to interpersonal development and community management. The importance of this division lies in its ability to provide a clear framework for discussing and developing training programs, allowing school principals to identify areas of strength and areas needing development. Furthermore, this organization facilitates the identification of competency gaps and aids in the formulation of more effective educational policies, promoting more efficient (measured) school management adapted to the demands of the educational environment.

However, the dynamic nature of education and the constant evolution of school and community needs will require periodic updates to this taxonomy to ensure its relevance and applicability in the professional development of principals. Additionally, it would be beneficial to conduct field research to expand, qualify, or even exclude the findings presented here through direct inquiries with school principals.

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