



**Business Plan: Implementation of a school from 1<sup>st</sup> to  
12<sup>th</sup> grade with integrated arts and sports programs**

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## **Resumo**

Uma vez a educação ser tão importante para o desenvolvimento de qualquer país, Portugal tem vindo a incentivar práticas que melhor respondem às necessidades dos alunos. No entanto, ainda existe um longo caminho a percorrer uma vez que muitas pessoas ainda veem disciplinas como o Português e a Matemática como as únicas disciplinas importantes e defendem uma sala de aula tradicional.

Já foi provado por diversos autores que a arte o desporto são fundamentais para a educação e, por isso, deve ter um maior papel nas escolas. Uma boa educação centra-se no aluno, recorrendo a práticas adaptadas às características dos alunos e contextos em que estão inseridos. A arte e o desporto ajudam as crianças a adquirir competências precisas para o dia-a-dia, na sua vida pessoal e profissional.

A Academia Geração é um colégio que aproveita a flexibilidade curricular para introduzir programas de arte e de desporto desde o 1º ano, para além das áreas académicas tradicionais. O seu grau de exigência vai aumentando, tornando-se mais específico e pormenorizado consoante o aluno passa de ano. Para além destes programas, a escola oferece disciplinas menos frequentes no currículo Português mas também essenciais, como debate, fotografia, primeiros socorros. Com o desenvolvimento de um plano de negócios para esta escola, pretende-se colmatar a falta de oferta de planos alternativos para estudantes que queiram seguir a área de desporto ou das artes em Portugal ou que apenas desejam ter uma educação mais completa com uma maior oferta de oportunidades.

**Palavras-chave:** educação, sala de aula tradicional, flexibilidade curricular, planos alternativos, programas de artes e desporto, currículo Português, planos alternativos, oferta de oportunidades

## **Abstract**

Since education is so important for the development of any country, Portugal has been encouraging practices that better address students' needs. Nevertheless, there is still a long way to go since many people still see subjects like Portuguese and Mathematics as the only important subjects and defend a traditional classroom.

It has been proved by many authors that the arts and sports are fundamental for the education and, because of that, it should have a bigger role in schools. A good education is centered on the student. It uses practices that are adapted to the characteristics of the students and the contexts they are in. The arts and sports can help children acquire skills that they need in their daily personal and professional lives.

Academia Geração is a private school that takes advantage of curricular flexibility to include arts and sports programs since the 1<sup>st</sup> grade, in addition to the academic subjects. Its degree of demand increases and becomes more specific and detailed as the moves forward. Adding to these programs, the school offers subjects less common in the Portuguese curriculum, such as debate, photography, first aid training. With the development of a business plan for this school, it is intended to tackle the lack of offer of alternative plans for students who want to pursue sports or art or just wish to have a more complete education with a wider offer of opportunities.

**Key terms:** education, traditional classroom, curricular flexibility, alternative plans, arts and sports programs, Portuguese curriculum, offer of opportunities

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## **Glossary**

**STEM** – Educational program in the fields of Science, Technology, Engineering and Mathematics.

**MI** – Multiple Intelligences – a theory proposed by Howard Gardner.

**PEP** – Projects, Exhibitions and Presentations

**PISA** – Program for International Student Assessment – worldwide study that, every three years, tests 15-year-old students in reading, mathematics and science.

**SEM** – Sports Education Model – Model designed by Daryl Siedentop to deliver physical education programs at the upper elementary, middle and high school levels.

**SDG** – Skill-Drill-Game

**IB** – International Baccalaureate – international recognized course for 16-19-year-old students

**IBO** - International Baccalaureate Organization

**PE** – Physical Education

**OECD** – Organization for Economic Co-operation and Development

**AMSC** – *Academia de Música de Santa Cecília*

**CSJB** – *Colégio São João de Brito*

**EDCN** – *Escola de Dança do Conservatório Nacional*

**DGE** - *Direção-Geral da Educação* (Education General Direction)

**LSM** – Learning Management System

**DGEEC** – Statistics General Direction of Education and Science

**n.d** – No date

**m<sup>2</sup>** – Square meters

## **Executive Summary**

This project consists in a school called Academia Geração that incorporates arts and sports programs in the curriculum. The idea of creating a school with a more diverse curriculum comes to address the demand increase for alternative programs from the traditional Portuguese curriculum and the need to improve education in Portugal. The school not only offers a good education in the arts and sports, but also, provides a system where students have more freedom to choose what they study. The location chosen for the school was Lisbon.

The target audience for this school is any student from the Lisbon area, mainly, that wishes to study art or sports or just wants to have a more diverse education. The differentiation focus strategy was chosen since the target is narrow and the service the school offers is unique and different from the competition. Academia Geração offers an environment for students to be whoever they want to be and feel comfortable in it, which is the message to be transmitted to the public. All activities are included in the tuition fees and the service is of high quality and with different characteristics so the tuition fees are slightly above average of the competitors.

Even though, it is a private school, a percentage of the students, 10%, come from low-income families because it is important to allow access to good quality education to everyone. Those students will attend the school with the help from private companies that finance their school expenses. Strategic partnerships will be established with companies to finance students with difficulties and provide more opportunities like experiences abroad or internships for the students and, this way, enrich their educational experience.

The project requires a high investment of 1 985 283,60€, which can be made 100% by an investor or ask for a loan. Despite the high investment, it is forecasted a good profit for the school. Also, the school opens with grades from 1<sup>st</sup> to 4<sup>th</sup> and every year and the rest of the grades open gradually, one each year. This means, the investment can be phased out throughout the years. The revenues come mainly from the tuition and enrolment fees, while the main cost are the teachers' salaries.

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## **1. Introduction**

Much has changed and evolved in the last few years, so it only makes sense that education accompanies those changes. I believe every student should feel comfortable in school and have the opportunity to succeed no matter what their interests and strengths are. Despite the efforts made in Portugal to improve education, many people continue to believe an academic oriented education is the best education for everyone. However, a very linguistically and logically-mathematically based school (Hoerr, 2000) may hurt students with abilities in other intelligences (Gardner, 1993). I've experienced the Portuguese system but I've also studied in the United States for a year in high school, which allowed me to experience a different reality in school. I had the opportunity to try many different subjects and activities that I would have never add the chance to in Portugal. This made me want to make changes in the system in Portugal.

In this paper, I'm proposing the creation of a school that integrates arts and sports programs in its curriculum, providing a wider range of opportunities for students to learn and to express themselves. It is a school that focuses on students and provides a high quality education with arts, sports and many other subjects and projects that are not as common in Portuguese schools as it could and should. People are different and that is good, not everyone has to like the same things. Arts and sports are equally important for education and equally important careers. Not every child has the opportunity to attend activities outside school so offering them in school allows more children to have access to it because everything is in the same place. If universities and employees want people with many different experiences, schools need to provide the tools for students to have as many opportunities as possible to enrich, not only their curriculum, but also their personal lives.

I'll be starting with a literature review on topics such as education in the globalized and technological world we live in, educational theories, approaches to teaching, the arts education and sports in education. Next, present the results from the primary research developed through questionnaires. After that, there is a detailed explanation of the concept and how the school is structured, taking the Portuguese educational context into consideration. I'll continue with an external and internal analysis, followed by a strategy development. At the end, I develop a financial evaluation to be aware of the costs involved in the implementation of this project and the investment needed for it. I finalize with a future outlook and conclusion.

## **2. Literature review**

There is no question that a good education is key to succeed in life and for many years now, education has been a widely discussed issue. Many questions have been raised about what children should be learning in school and how, the opportunities they should be given and the support they should have. In this chapter, I present substantial findings regarding education. I collect theories, models and current knowledge that are important to consider when developing a project for a school. A notion of what education is today and its context in the European Union and the entire world must be considered. Also, the MI theory and the IB program are worth mentioning since they have a big impact on how countries choose to build their educational system and they offer a strong view on putting the student in the center of it all. Findings on the arts and sports are presented as well due to the fact that they have been gaining importance, not only in society, but also in education.

### **2.1 Education today**

“Everyone has the right to quality and inclusive education, training and lifelong learning in order to maintain and acquire skills that enable them to participate fully in society and manage successfully transitions in the labor market” is an European pillar of social rights (European Pillar of social rights, n.d).

The European council has identified education as an issue of concern for the EU and it has recognized that it plays a significant role for Europe and its citizens. It is the “backbone of growth and inclusion in the EU” and it prepares citizens to embrace the opportunities that come along and overcome the challenges of the fast moving and globalized world we live in (Council of the European Union, 2018). Education lays the foundation for learners’ self-fulfillment in civic and social life, in labor and in their personal lives and it helps individuals to develop a set of key competences, to take responsibility for their lifelong learning and careers, and to become active and responsible citizens in society (Official Journal of the European Union, 2017). As Tibor Navracsics, European Commissioner for Education, Culture, Youth and Sport, has stated in the first European Education Summit, “education is key because it is education that helps us adapt to a rapidly changing world, to develop a European identity, to understand other cultures and to gain the new skills one needs in a society that is mobile, multicultural and increasingly digital.” (Europa Nostra, 2019)

On December 18th of 2006, eight key competences for lifelong learning were designed as being particularly relevant in personal fulfillment and development, social inclusion, active citizenship and employment. They were: Communication in the mother tongue; Communication in foreign languages; Mathematical competence and basic competences in science and technology; Digital competences; Learning to learn; Social and civic competences; Sense of initiative and entrepreneurship; Cultural Awareness and expression. All eight competences are considered equally important and can connect with each other (Official Journal of the European Union, 2006). Since education plays the part of ensuring that all pupils acquire these key competences, there is a need for every education system to include all the knowledge, skills and competences (European Commission, 2017). The key competences for lifelong learning have been working as a reference document for policy makers, educators, social partners and learners themselves to facilitate national reforms, peer learning, the exchange of information and for the development of competence-oriented education, training and learning since its adoption (Official Journal of the European Union, 2006).

Another important aspect to take into consideration regarding education and lifelong learning is that it should start early in life. Member States should be aware of the “importance of early childhood education and care that lays the foundation for higher performance at all future education levels” (Official Journal of the European Union, 2017) Since the skills and competences people learnt in school will be present throughout their lives and will help them in many situations, it only makes sense that all the key competences are developed from an early age. This way, children will be prepared to face any challenge, to continue their studies and to develop further skills. In addition to starting from a young age, it’s crucial to “support all learners, including those facing disadvantages, or having special needs, to fulfill their potential”. (Official Journal of the European Union, 2018) “The risk of becoming a low achiever is four times higher for pupils from a weak socio-economic background” (Council of the European Union, 2018), which means that Member States need to ensure that disadvantaged groups are given the adequate support to fulfill their educational potential. (Official Journal of the European Union, 2018). Despite of what some people may think, quality education does not only mean achieving good results, but it is about ensuring that all pupils have the required support to achieve good results (Official Journal of the European Union, 2017).

Even though education and training systems are generally good in Europe, there are shortcomings and advanced Asian countries outperform Member States. It is an interest of all EU Member States to invest in education as it is a driver for jobs, social fairness, active citizenship and it strengthens Europe's resilience. There is the desire to overcome borders and allow free movement so Member States can share the best ideas and practices to ensure quality education and stay competitive (Official Journal of the European Union, 2017).

## **2.2 Creativity and innovation in education**

“Creativity and innovation are becoming increasingly important for the development of the 21<sup>st</sup> century knowledge society. They contribute to economic prosperity as well as to social and individual wellbeing and are essential factors for a more competitive and dynamic Europe.” These are two aspects that have been very much present at the European Commission agenda for a long time and it is clear that Member States should foster creativity and innovation at all levels of education (Ferrari, Cachia & Punie, 2009).

According to Anusca Ferrari, Romina Chachi and Yves Punie (2009), “creativity is a form of knowledge creation”. Therefore, its stimulation has positive effects in learning, supporting and enhancing self-learning, lifelong skills and competences. “Creativity has been defined as a product or process that shows a balance of originality and value. It is a skill, an ability to make unforeseen connections and to generate new ideas.” Even though creativity is often seen as a talent or a common characteristic of eminent people, many studies recognize that creativity is a quality that ordinary people can possess, so it can be enhanced and cultivated. “Educational actors have the power to unlock the creative and innovative potential of the young” (Ferrari, Cachia & Punie, 2009). Creativity is part of childhood, how children create games and stories. Then, it makes sense that children learn by creating. If creativity is brought into the classroom, knowledge is created and students enjoy their learning experiences (Shulman, 2018). At one of the European Council meetings, it has been recognized that “promoting creativity, innovation and digital competence through education during the early years can produce benefits later on, laying the foundations for further learning, by enhancing knowledge to be developed to a much higher level and by generally improving each child's ability to develop creative and critical thinking skills and to become responsible citizens for the Europe of tomorrow.” At this meeting, being clear the benefits of

creativity and innovation, the Council invited Member States to encourage educators and training providers to adjust their programs by incorporating new learning tools and pedagogies that foster creativity and innovation from an early age (Official Journal of the European Council, 2015).

“Creativity is often perceived as a synonym for imagination and originality, and is allegedly connected to the visual arts, music and artistic performance.” Even though creativity is relevant in those fields, we shouldn’t forget about all the other areas of knowledge because all school subjects can benefit from creativity (Ferrari, Cachia & Punie, 2009). For instance, fostering the acquisition of competences in science, technology, engineering and mathematics (STEM) by taking into account their link to the arts, creativity and innovation, enriches learning (Official Journal of the European Union, 2018). It’s clear that every subject plays a relevant role in the students’ education and contributes in its own way, so curricula should give the same importance to every subject but foster creativity in them at the same time (Ferrari, Cachia & Y. Punie, 2009). High Tech High in San Diego, California, is a school where teachers and students build a strong relationship and work together. Instead of having a standardized curriculum, art teachers combine their lesson plans with other teachers so that students can have an artistic understanding of how to create experiments (Knight, 2014). If cross-discipline learning is encouraged, the connectivity between different subjects in the curriculum is strengthened and a link between of what is being taught and societal change and relevance is established (Official Journal of the European Union, 2018). McGlynn (2005) has defended that millennials appreciate activities that permit creativity and they want to be involved with “real life” issues that matter to them. They like to work collaboratively and if they see more connections with the material, the more engaged they become and more easily they will be able to retrieve it (McGLynn, 2005). This means that the curriculum should be more flexible and it should take the interests of the learner into account. There has to be a balance between different areas of education, balance along the curriculum (from pre-school to higher education), balance between prescription and freedom and balance between students’ interests and other educational stakeholders (Ferrari, Cachia & Punie, 2009).

“Creative learning can be seen as a form of learning that favors understanding over memorization” (Ferrari, Cachia & Punie, 2009). Memorization of facts and procedures is important. However, it is not enough for progress and success in our society anymore. Other skills are essential now more than ever, such as problem

solving, critical thinking, ability to cooperate, creativity, computational thinking and self-regulation. “They are tools to make what has been learned work in real time” (Official Journal of the European Union, 2018). “Creative learning” refers to the possibility for learners to develop creative skills, go beyond notional acquisition and to learn in a new, creative way. Learners, through creative learning, gain the skills that enable them to see things from a different perspective, find new solutions and generate new ideas (innovate). Creativity in education is necessary for future innovation, but at the same time innovation is needed to improve education. “Innovative teaching is the process leading to creative learning, the implementation of new methods, tools and contents which could benefit learners and their creative potential”. For schools to promote creativity, innovation and entrepreneurship, learner-centered pedagogies and teachers’ empowerment and support are seen as key enabling factors (Ferrari, Cachia & Punie, 2009).

### **2.3 Teaching approaches and multiple intelligences theory**

Learning is already a complex process, which means, choosing the “best” approach to use is important. But the “best” approach also depends on the context. Before selecting an approach, the level of proficiency of the learner and the level of cognitive competence required for the task need to be taken into consideration (Ertmer & Newby, 2008). There is a diverse population of learners, so “to be successful in educating all of our students, we need to be aware of their individual learning styles and multiple intelligences” (Snyder, 2000). A number of theories regarding learning have questioned education and how it is approached.

In traditional classroom, learning is fragmented and the content is taught in isolation (Koff & Warner, 2001). Teachers focus mainly on helping students respond to a curriculum that was planned and taught, making some students spend most of their time using intelligences that are not their strongest (Hoerr, 2000). Too often, students who lack strong linguistic and mathematical skills, leave school as soon as possible because they feel frustrated by continued failure (Koff & Warner, 2001). There is a general lack of curiosity of the students in the classroom because they can’t make the connection between what they are learning and their personal lives and futures (Knight, 2014) and they don’t see the value or purpose in what they are learning. Perhaps, these are signs that the school system does not make use of the students’ particular strengths. In traditional classrooms, skills like good communication, critical and creative thinking,

ability to research, organize work, work independently, take responsibility for themselves and work in collaboration with others aren't addressed properly. (Koff & Warner, 2001). Since information is created and shared faster and with the progress of technology, working with others is a critical part of today's society (Hoerr, 2000).

Nowadays, there has been a bigger concern for a more holistic approach to learning. Most educators have recognized that students learn best when they construct knowledge (Hoerr, 2000) and that they need to be actively engaged with the contents they learn in class (McGlynn, 2005). The constructivist approach, contrarily to the traditional classroom where teacher disseminates knowledge (Hoerr, 2000), defends that students must have a more active role in class (Ucur & Acar, 2018) by experimenting, testing hypothesis and seeking understanding. The teachers create situations where students learn from firsthand experiences and get a feeling of achievement when creating meaning "by discovering an important concept or skill". The chance of what is learned being understood and retained increases (Hoerr, 2000). The constructivist or students-centered approach emphasizes the importance of empowering the students (McGlynn, 2005) and teachers using this approach are able to better address the needs of all kinds of students than through a "chalk and talk" format (Cook, 2005).

Regarding the idea that teaching should be more student-centered, there is the multiple intelligences (MI) theory by Howard Gardner. To begin, defining intelligence is a mandatory task when discussing this theory. In a traditional vision, intelligence is defined as the ability of responding to items in an intelligence test. It is seen as an attribute or innate faculty of the individual (Gardner, 1993) that is implicit in standardized tests (Hoerr, 2000). For Gardner, on the other hand, intelligence is defined as "the ability to solve a problem or create a product that is valued in a culture". And "solving a problem or creating a product" focuses on using a skill in real-life situations, so it can mean changing a group that can't agree on anything into a productive team, for instance (Hoerr, 2000). The traditional definition of intelligence does not address all areas of human knowledge, which is why Gardner defends that there is a set of capacities, talents or human abilities, called intelligences (Gardner, 1993).

Gardner defines seven intelligences, which are linguistic, logical-mathematical, spatial, musical, bodily-kinesthetic, interpersonal and intrapersonal intelligence. The linguistic and logical-mathematical capacities are considered intelligences in the traditional view as well and together they form the ground basis for the IQ tests. The linguistic intelligence is focused on the production of sentences and it is a skill



presented in a more complex form by poets. The logical-mathematical intelligence is frequently known as “scientific thinking” and the process of problem solving is usually faster. When a sailor is at sea with no instruments, he needs spatial intelligence to navigate, by mapping his location in his mind. Spatial intelligence is used when a person looks at an object from a different angle in visual arts or in a chess game, for example. Yehudi Menuhin’s musical intelligence was expressed when he reacted to the sound of a violin and then rapidly evolved to an international musician. This intelligence is characterized by the perception and production of music and, somehow, Menuhin was biological prepared for that intelligence. As Menuhin, Babe Ruth is another example of a prodigy that discovered his “instrument” on the first contact with it. He had bodily-kinesthetic intelligence. He had the ability to use his entire body or parts of it to solve a problem or create a product, which is very common in athletes, dancers and surgeons. The interpersonal intelligence is based on the understanding of others, their wishes and intentions, even if they hide it. It is a common characteristic of politicians, professors, therapists and parents. While the interpersonal intelligence allows us to know how to work with others, the intrapersonal intelligence allow us to understand work with ourselves. People with a strong intrapersonal intelligence have a viable and effective model of themselves to use in life (Gardner, 1993). Intrapersonal intelligence is key for us to take advantage of our talent because we are able to identify and understand our strengths and weaknesses. “Having a weakness isn’t nearly as much of a problem as not knowing what the weakness is.” If we know our strengths, we can identify situations where we know we will succeed and knowing our weaknesses helps us avoid situations where we will most likely fail. Contrarily, having a weak intrapersonal intelligence will make us continue making the same mistakes (Hoerr, 2000).

All individuals possess those intelligences. But individuals have different levels of development of each intelligence and different combinations between them. The intelligences are independent to a significant level, meaning that a high level of logical-mathematical does not require a high level in musical, for example, and in adult cerebral damage we can witness loss of some intelligences, while others are spared. Nevertheless, in any normal adult, there is a fusion between a number of them. For example, dance requires bodily-kinesthetic, musical, interpersonal and spatial intelligences. The linguistic and logical-mathematical intelligence are not more important than others, they are simply put on a pedestal by society. If you have those

intelligences as the strongest, you will probably do well in IQ tests and enter universities such as Harvard. The problem is once you leave the university, your success will depend much on the extension of your other intelligences (Gardner, 1993). When Hoerr gave presentations on MI, he often asked participants to write down people's names they considered intelligent, bearing in mind that the definition of intelligence was up to them. Then, he would ask to discuss in groups their answers and share with everyone their common people and characteristics. Regardless the composition of the audience, whether they were teachers, parents, from Australia or Chile, "the results were nearly the same". Rare was a person who was identified as intelligent solely due to his/her skills of reading, writing or computing (Hoerr, 2000). Almost every role in society demands more than one intelligence, so it is important to see individuals as a collection of skills. One individual may not be gifted in one intelligence but might be able to do well with a particular combination of intelligences. Even if one day was possible to know all existing knowledge or a significant part of it, that is not realistic nowadays. In that manner, a uniform education does not make sense. We must guarantee that everyone receives an education where his or her intellectual potential is emphasized. MI takes all intelligences profiles seriously and develops a curriculum that offers a solid base of suggestions and several options of choice for all students (Gardner, 1993). It is a student-centered model where the curriculum is adapted to the students because it relies on the belief that "all children have strengths" and each child is unique. It is evident that all students can benefit from this approach. But, especially the ones with difficulties in learning primarily through linguistic and logical-mathematical intelligence. They can be more motivated to learn since their intelligences are valued (Hoerr, 2000).

There is not one right way to implement MI. Each school and teacher adopts it according to his or her preference and in a way that reflects the school's context and culture (Hoerr, 2000). Gardner suggested one way to implement a school centered on the individual by outlining a series of essential roles for the school or the school system. The first one was an assessment expert with the task of developing a regular and up to date evaluation of each student. This evaluation should be adequate to the child's level of development in that specific domain of knowledge. This expert works along with a student's curriculum agent that recommends students on the most adequate courses, classes, learning style and presentation tools for their intellectual profiles. Finally, the

third role is called the school-community agent, who looks for educational opportunities outside school (Gardner, 1993).

MI shouldn't be viewed a spontaneous occurrence. Instead, it should be used regularly and embedded in the school's culture. Incorporating every intelligence in every class is not realistic, "some lessons will remain single-intelligence lessons" but students will have a learning environment where they have the liberty to take risks and use different intelligences. As Hoerr explores in "Becoming a multiple intelligences school", there are a variety of strategies available that help to pursue MI. Two examples are the use of projects, exhibitions and presentations (PEPs) and thematic instruction. With PEPs, students use their best intelligence to express what they really know to an audience, being a way to educate the audience on the effectiveness of MI as well. A thematic instruction happens when the curriculum is related directly to the chosen theme instead of being mere content. Teachers, after choosing the theme, build the curriculum around it. (Hoerr, 2000).

Every school's journey in implementing MI will always be a work in progress but having "strong administrative vision and leadership" helps and recognizing the phases to implementation enables anticipation and planning to ease the way. According to Hoerr, the stages to MI implementation are awareness, exploration, courtship, full speed ahead, roadblocks, regrouping and "an MI school; a MI learning community" (Annex 1). Adding to these steps, Hoerr lays down three factors that will increase the likelihood of teachers achieving success in MI. Firstly, "the faculty must maintain a commitment to students; they must be doing MI for the right reasons". It is important to clarify that the main focus of MI is on the students and that MI is only a tool, not an end. The only valid reason to implement MI in the classroom is to enable all students to learn and reach their potential. Secondly, "teachers are far more likely to thrive when they have the support of their peers, when they work and learn as colleagues". Lastly, "teachers must have the support of the administration". Administrators need to be a part of the MI journey, be supportive and trust and respect teachers. Decisions that have been discussed with others, when teachers are asked to contribute with ideas are stronger, the quality is higher, and the probability of acceptance increases. However, in the end, it is the principal of the schools who must take a stand and decide based on what is best for the students. In addition, educating parents is an indispensable task since an MI school is very different from the school they attended and they are not familiar with it (Hoerr, 2000).

Teachers apply different methods, strategies and approaches when giving a class. They usually teach using the intelligence they feel more comfortable with. But they should accept they are not strong in every intelligence and there is no problem in looking to others who have different strengths and see their strategies to teach a specific content using a specific intelligence. People have their own experiences, ideas and talents so learning from one another is a necessity. Communication and brainstorming between teachers from different subjects help finding new tools to teach students in particular situations. Another possibility is students rotating among a set of teachers focusing on the same content but using different intelligences (Hoerr, 2000).

### **2.3.1 Teachers' role**

“Each of us can look back on the teacher who made a difference for us. We may not remember the formal curriculum or what knowledge or particular set of skills we learned from that teacher, but we know that person made a difference in our lives”. Surely, teachers play a key role in a child’s education. (Hoerr, 2000)

Teachers can stimulate children’s curiosity, imagination and willingness to experiment. They help students develop basic skills and specific knowledge, but at the same time, transversal competences required for creativity and innovation (EC, May 27th), which is necessary as mentioned before. Educators’ task goes beyond teaching the content of the course. It is their job to teach students how to become effective learners, guide them in honing their critical-thinking skills (McGlynn, 2005) and construct a creative climate for learning (Ferrari, Cachia & Punie, 2009). Even if it is a goal of Member States to promote creativity and innovation in their educational policies, it isn’t guaranteed that all schools will put that into practice. Many researchers have found that one of the barriers of implementing creativity and innovation in schools, are the teachers themselves, due to their overload schedules, the perceived lack of relevance (Ferrari, Cachia & Punie, 2009) and the pressure of having their students achieve the best results in standard exams, has it happens in Portugal (Sousa, 2019).

Teachers may also be resistant to change and to bring innovativeness in the classroom due to their unwillingness to learn, their lack of consciousness of teaching behavior, incomplete reflection and dominant conception of teaching and learning. When an innovative design comes to the table, teachers have their own interpretations and translate it into their educational practices. Their conceptions may influence the way teachers implement that educational design (Könings, Brand-Gruwel, & van

Merriënboer, 2007), meaning that teachers need to be well informed so students' creativity can be fostered (Ucus & Acar, 2018) through their teaching approaches.

On the other hand, even if the teachers are determined in changing their teaching approach, they need the support from policy makers and institutions to fulfill expectations and respond positively to requests (Ferrari, Cachia & Punie, 2009). A teacher, as an important stakeholder of education, needs to be both advocate and educator, constantly and interchangeably (Morgan, 2018) and he/she will need support, in terms of training and ongoing institutional support to be able to do that (Ferrari, Cachia & Punie, 2009). This training should include constructivist learning and child-centered teaching (Koff & Warner, 2001). Providing teachers with these work conditions, values them. In Finland, for example, teachers' status is equal to Finish doctors and lawyers. There are not comparison rankings or competition (Knight, 2014).

Moreover, teachers should collaborate with educational designers since they are able to provide feedback on the practical side of the design. Teachers can give information about successfully or unsuccessfully implemented aspects of the suggested design. An educational design can fail to implement for different reasons, such as not being feasible in practice, lack of guidelines, not being suitable for realization in educational practice, teachers' lack of experience, the school, no resources or even because of the students. But if teachers provide feedback, its failure may be prevented (Könings, Brand-Gruwel, & van Merriënboer, 2007). In MI school, particularly, teachers' role becomes even more important because they invest in creative ways to develop the curriculum and assessment tools. Also, we have learnt many times teams are more productive than individuals, so teachers in MI school, usually, work collaboratively rather than in isolation and with administrators as well. Teachers feel a "sense of ownership" this way, are supported by a strong leadership and growth together (Hoerr, 2000). In MI schools there is a constant collaborative seek for new information and understanding of how to best meet their students' needs (Konukman, Battisti & Haibach, 2011).

### **2.3.2 Assessment**

How teachers assess student progress determines how they teach as well. To resort ways that only assess linguistic and logical-mathematical intelligence and not allowing students to demonstrate what they know through their strongest intelligence is unjust and does not give present the real child's potential to parents. Assessment is a

tool that provides feedback to students on how they are doing allowing them to monitor their work and learn from their performances. It also gives parents confidence in a school that is different from the one they attended and allows teachers to know how well they are doing their job, what still needs to be worked on in class and suggest learning options to students with difficulties. For the larger community, it provides the chance to educate people about the MI's learning advantages, to show that there are other ways to measure students' progress and prepare them for the real world. Teachers can use different tools such as projects, exhibitions and presentations (PEP's), report cards and progress reports and having portfolio night. Portfolios allow teachers and parents to have an insight of the students' work and growth and provide a moment for students to understand themselves and review their work (Hoerr, 2000).

Since the early 1900s, the idea that intelligence could be measured has prevailed, taking the I.Q tests as an example. But how can a single test and a single score capture all of an individual's potential? Although standardized tests can be used with validity in certain situations, they are frequently misused and overused because they are easy to use, cheap and accepted by the public. The problems associated with standardized testing is that what is actually being measured may be different from what it was intended, and the intelligence is measured narrowly. The test basically measures how well the student reads and computes. For a long time, schools have only focused on scholastic intelligences. However, real life success involves much more than just these assessed intelligences (Hoerr, 2000). As Knight argued, in some countries such as the US and South Korea, teaching is mainly focused on test preparation. Standardized testing in South Korea has delivered successful scores and students have entered top universities in the US. Yet, they also have the highest dropout rate of the US universities and many emotional consequences arise. South Korea's suicide rate is among the world' highest. On the PISA exams in 2009, US students had intermediate scores, contrarily to Finish students, who had "stellar scores". The difference is that in Finland, students don't have many standardized tests in their education system, but they still had great results on a standardized test. In a school in the US, High Tech High in San Diego, California, teachers don't prepare students for the exams. Instead, they focus on teaching their classes and when it's time for an exam, they get good results. Since 2003, they have entered colleges like MIT, Stanford and John Hopkins (Knight, 2014).

### **2.3.3 International Baccalaureate**

In 1968, the first program of the International Baccalaureate (IB) was created with the ambition to provide a challenging but at the same time, balanced education. It would be a door to geographic and cultural mobility with an internationally recognized university entrance qualification. Nowadays, there are four different IB programs and all share the common goal of enabling students to understand the complexity of the world surrounding them and to prepare them to take responsibility for their actions in the future. It is IB's vision and mission to "empower young people with the skills, values and knowledge to create a better and more peaceful world". The students are in the center of the IB education and they are challenged to excel, not only in their studies, but also in their personal growth (IBO, 2017). During the IB courses, students develop a set of attributes that will help them create a better world and that goes beyond intellectual and academic success. They become inquirers, knowledgeable, thinkers, communicators, principled, open-minded, caring, risk takers, balanced and reflective (IBO, 2014). IB works towards developing internationally minded people, which means it intends for people to be opened to the world and to understand the interconnectedness to others. Students are aware of cultural differences and they learn to not only respect themselves, but also, others and the world around them (IBO, 2017).

The four IB programs are the Primary Years Program (from 3 to 12 years old), the Middle Years Program (from 11 to 16 years old), the Diploma Program (from 16 to 19 years old), and the Career-related Program (from 16 to 19 years old). The programs emphasize the importance of relationships between academic disciplines and with all of them culminate in a project where students can showcase their understanding and skills. IB explores six approaches to teaching and they are centered in inquiry, action and reflection. They are "Focused on inquiry"; "Focused on conceptual understanding"; "Developed in local and global contexts"; "Focused on effective teamwork and collaboration"; "Designed to remove barriers to learning"; "Informed by assessment". IB schools use a wide range of strategies to assess the students' performance because it is also important for students to learn how to assess their own work and the work of others (IBO, 2017).

### **2.4 Arts education**

"We need to recognize that the arts play an important role in our society". Not only arts provide moments of pleasure, telling stories and communicating emotions, it

can also be used as a tool for learning. “Valuing and emphasizing the arts will make a difference for students” and if students experience the arts in their education, Hoerr believes they “will continue to value the arts for the rest of their lives” (Hoerr, 2000).

Educators have tried to find ways to integrate subject material and make connections between the ideas and concepts learned in different subject areas (Koff & Warner, 2001). An arts program that is an integral part of the curriculum is an activity that supports the believe in MI theory and schools like New City School have been doing it. Believing in MI means that arts are valued as well because it makes the musical, spatial, and bodily-kinesthetic intelligences equal to the linguistic and logical-mathematical intelligences (Hoerr, 2000). Even so, that doesn’t happen in every country, it is still a work in progress (Koff & Warner, 2001).

Arts are often cast extra and seen as a distraction from solid skills-based education focused on reading, writing and arithmetic (Cook, 2005), from the real students’ preparation to the world (Knight, 2014). All fine arts suffer a misunderstanding from cultural prejudice that places them solely in the category of performance and entertainment, while excluding all the other aspects of learning and education (Koff, 2005). Society is a system in which individual experiences are affected by structured of politics and government (Cook, 2005). Then, people’s reaction to when someone says their studying arts is a reflection of education and of how art is communicated to students by teachers and society as being useless and wasteful (Knight, 2014). Educators from academic subjects often do not support the arts, especially when it involves taking funds from their disciplines to art projects (Koff & Warner, 2001). If arts programs continue to be devalued by educators and schools, students will adopt the same idea that arts aren’t relevant to their lives (Knight, 2014). Studies have shown that when it comes to budget cuts, programs like art and music are the first ones to be eliminated (Knight, 2014). In MI schools, balancing budgets aren’t accomplished by sacrificing the arts because when the arts are sacrifices, it is the same as telling students that how they learn isn’t relevant (Hoerr, 2000). It is important that the government protects education from cuts and people who make policies regarding education need to value arts too in order to include it in the policies they make (Knight, 2014).

The access to arts education isn’t equal for everyone. When comparing groups of students by art involvement, the family background causes the major difference. Students from disadvantaged socioeconomic background and less educated families are



more likely to record low levels of participation in the arts during and middle and high school. The probability of low arts' involvement is twice as high for students coming from an economically disadvantaged family (Catterall, Chapleau & Iwanaga, 1999). Shirley Brice Heath studied community-based organizations for disadvantaged youth to go after school and organized them into 3 categories (athletic/academics, community-service and arts-based). In these organizations, talent was valued, the interests of the youth were key development factors for the individuals and the group and learning became an enjoyable challenging risk. Students were given the room to fail as well to succeed and the opportunity to collaborate, to show discipline, to be expressive and sustain challenging team memberships. These organizations help fill the "institutional gap" (Heath, n.d).

Regardless of the difficulties in integrating arts in the curriculum still being an issue, Elizabeth Murfee, in 1996, has defended that "the arts are serious and rigorous academic subjects" that can help students reach their educational goals. "Schools that incorporate music, art, drama, dance, and creative writing into the basic curriculum have found that teaching has a significant effect on overall success in school. Because the arts are closely associated with important ideas and events in history, students who have a good background in the arts are likely to have a richer source of information and insight to draw upon, compared to those who do not study the arts" (Murfee, 1996). Even with percentage of students involved in art related activities decreasing from 10th to 12th grade, the results' differences between arts-involved and non-involved groups increases over the years (Catterall, Chapleau & Iwanaga, 1999).

"Children are powerfully affected by storytelling, music, dance and visual arts. They often construct their understanding of the world around musical games, imaginative dramas and drawing". It is a part of every child to be artistic and arts education allows students to explore that. In addition, once creative learning is explored early, it lasts for a lifetime and can be applied in other life situations (Murfee, 1996). Art education transforms the classroom environment. It fosters motivation (Murfee, 1996) and, as *Champion of Change* researchers have found, through the engagement with the arts, learners can also attain higher levels of academic achievement (Fiske, 1999) because they are reached in ways that are not otherwise being reached (Fiske, 1999). Even students, who have more difficulties in traditional academics, might discover an artistic talent that is yet to be explored (Murfee, 1996) and students who are

already considered successful are given new challenges (Fiske, 1999). All factors mentioned before can increase attendance and decrease dropout rates (Murfee, 1996).

In addition to the development of cognitive competencies (Fiske, 1999), arts education supports the development of empathy and kind citizenship. Social justice-oriented citizenship is heightened because students become aware of other truths, perspectives and diverse people. They learn to respect differences and “build skills of negotiating and disagreement”. After a school shooting in Marjory Stoneman Douglas High School, in Parkland, Florida, on February 14, 2018, it was witnessed a vital contribution of arts education to effective citizenship. A group of students organized a movement to stop gun related deaths. The leaders of this group were a part of the theater program of the school. In their production they had developed skills like organizing, negotiating, creating together, being articulate and succinct when speaking to a large group of people. All skills supported their ability to lead a nation movement (Morgan, 2018).

With the benefits of arts education in mind, “many are coming to the realization that arts programs should be moved away from the margins of the total curriculum and embedded in the mainstream of education” (Cook, 2005). A good example to take into consideration is Finland. There, the arts are interwoven throughout the elementary curriculum and are not taught as individual subjects until middle school. The value for arts education is the same as for academic classes (Guest Post, 2018). Lauren Knight compared art education in Finland, where it is valued, and in the US, where it seems to struggle. Finland’s education doesn’t rely on standardized testing and “Finland is believed to have one of the most successful educational systems in the world, according to PISA survey.” All schools are nationally funded, so the teachers never worry about not having enough supplies. Art isn’t necessarily valued more in Finland than in the US. But when Finish art programs are challenged, the public doesn’t lose its commitment to fight for it. When cuts happen in Finland, there is more popular and institutional support to stop the cut than there is in the US. The study by Lauren Knight “has shown that even a unique educational system like Finland’s, the arts will always need strong advocates to fight for it because the arts will always be threatened with cuts whether it be in hours, funding or cutting full programs” (Knight, 2014).

### **2.4.1 Dance education**

Dance provides hours of entertainment. When people think of dance, the images of amazing dancers like Mikhail Baryshnikov in a center stage comes to mind but these are the specialized few that have excelled as examples of a trained dancer. “In spite the efforts to place dance in public school curriculum, dance is still considered extra-curricular, and even expendable.” Dance is often categorized as a branch of PE (Koff, 2005) and educators sometimes overlook it, which can cause elementary students to be apprehensive to try dance at a later age (Konukman, Battisti & Haibach, 2011). All of this can start with the misconception of the definition of dance education. Dance education is different from dance training. Both dance education and dance training begin from similar foundations with the introduction of the use of the body, but dance education doesn’t seek to prepare a performer (Koff, 2005). The content and teaching strategies in the class need to be adjusted to the group age, so in an early introduction to dance, children from 3 to 6, should be exploring the creative movement, providing students with the tools and confidence to express themselves, instead of focusing on a particular style (Konukman, Battisti & Haibach, 2011). Once the student has become comfortable with the movement exploration, in sequence with self, others and the environment, through space, time and energy, dance training can take place (Koff 2005).

Not only dance education improves physical development, emotional maturity, social awareness and cognitive development” (Konukman, Battisti & Haibach 2011), but also, enables every child, every person, regardless of physical capabilities, to be expressive in a nonverbal manner and to explore and incorporate the physical self as a functioning part of the whole social being (Koff, 2005). Quality dance programs provide dance knowledge and skills, but, at the same time, the “safe haven” for many students and the cognitive skills needed in other areas (Cook, 2005). Regardless of the advantages of integrating dance in the curriculum, a good integration can only happen if there is a professional dance educator. Otherwise, it is very difficult to provide a meaningful dance experience. In addition, visiting artists play a meaningful role in emphasizing the dance components that are currently being explored, experienced or investigated but they need to prepare themselves in advance in order to make an appropriate contribution (Koff & Warner 2001).

## **2.5 Sports education**

Any participation in the sporting act enriches the individual, first at a personal level, and then the benefits are propagated at the community level (Urzeala, 2018). When used on a regulated and appropriate manner, physical education (PE) and sports can play an important role in satisfying youth's needs of having a healthy social life. They learn to socialize, to find friends and to communicate, correcting and preventing deviant behaviors (Talebzadeh, & Jafari, 2012). Physical educators must find innovative and student-centered designs that best address one of the physical education's main goals of allowing students to find a sport they can participate in for a lifetime. The MI theory and the sports education model (SEM) have in common the assumption that all students have unique talents and when they are participating in an activity, they are often developing more than one intelligence. "The time spent practicing and learning about a particular sport allows students to become proficient in more than one role, which hopefully leads to increased levels of enjoyment" (Martin & Morris, 2013).

Sports education model is an instruction model proposed by Daryl Siedentop to enrich the children's sports experience in school. This model can't be fitted into a short unit, multi activity program, as it happens in PE. Instead, it has six key features according to how sports are conducted, which are seasons, affiliation, formal competition, culminating events, recording keeping, and festivity. Seasons refers to the "unit" of sports education, which is often two or three times longer than PE units because it is assumed that less activities covered in greater depth leads to better educational outcomes than shorter units with multiple activities. Affiliation means students become team members for the entire season. They plan, practice and compete together, which indicates that social meaning and personal growth are related to the affiliation to a persistent group. Sport seasons are usually defined by a formal competition schedule, which provides the chance for students to pursue "important outcomes that have real meaning" for them (Siedentop, 1998). Culminating event is when students compete in a final event like the World Cup (Martin & Morris, 2013). Recording keeping is a way for students to receive feedback and help defining standards and goals. Finally, "educators and students work together to create a continual festival that celebrates improvements, trying hard, and playing fairly" by developing award ceremonies, for example (Siedentop, 1998).

According do Siedentop, sports education is not a direct simulation of institutionalized sport. It differs in the sense that it is typical to have "small-sided games

with modified rules, paces, and equipment” rather than using adult forms of games, all students are always involved and the role they play, varies. While in sport and in PE, students learn mainly the performer role, in sports education, all students learn the performer, the referee, and the scorekeeper role for each sport. And coach, manager, trainer, statistician, publicity officer and sports board member roles are rotated when seasons and sports change. Unlike typical PE approach, sports education “emphasizes strategic play more than isolated skill development”. A well-educated sports person “understands and values the rules, rituals and traditions of the sport, has learned to distinguish between good and bad sport practices, and is developing the willingness to act on that knowledge to improve the practice of sport”. Since they spend an entire season in a sport with the same team, they really establish strong relationships, which is not very witnessed in other physical education programs (Hastie, 1998). Nevertheless, it is frequent for conflicts to arise within teams in practice and during competition moments, so conflict-mechanisms must be addressed to prepare students to deal with those situations (Siedentop, 1998).

Dana Perlman developed a research to examine the influence of SEM on demotivated students’ physical activity in a sports-based physical activity unit. A class of demotivated students was taught through a skill-drill-game (SDG) approach and another through the SEM. While SDG focused on the concept of winning, in the SEM, the six key features of sports education were included in the principles transmitted to the students. Even though the study has some limitations and further research was needed, Perlman concluded that when compared with SDG, students were more physically active within the SEM. Therefore, it is possible to provide a sports-based experience in a way that influences demotivated students to change their physical activity behavior (Perlman, 2012).

## **2.6 A new curriculum**

At this point, we know that any task or cultural part in any field requires a combination or mixture of intelligences, and societies benefit from the diversity in intelligences among the population (Gardner, 1995). For this reason, subjects of physical education and the arts should be viewed as complementary activities when working on new policies (Talebzadeh & Jafari, 2012). The arts and physical education are two areas that are explored by students in the IB Middle Years Program as it seen in the program’s model in the annex 2 (IBO, 2014).

Despite the fact of sport and arts being commonly thought about separately in the fields of education (Long & Sandle, 2018), authors have researched about the synergy between them based on the association between the two elements belonging to a society's culture. There are links between them and they can benefit from each other. Arts involve creativity, innovation, discovery of new forms of expression and the transmission of a vision. These are characteristics witnessed in artistic sports as well, where competition choreographies are artistic creations that generate aesthetic values and that are designed to send a specific message. The major difference between the two is that in "a performance sport, the creative act is subordinated to the athletes' performance capacity and competition rules" (Urzeala, 2018).

When an athlete is performing an element with great difficulty, the effort is not visible in his/her facial and gestural expression because he/she transmits safety, ease, fluency and elegance, which result in aesthetic attributes of movement and closeness to the arts. In Basketball, spectators can be impressed by the technical-tactical structure ended in an unsuccessful basket throw because they admired the beauty of the situation created. Nevertheless, performance wise, the official result is not the perceived by the audience, but the one on the scoreboard. On the other hand, in other sports such as rhythmic gymnastics, figure skating and synchronized swimming, "the rigors of the technical executions generate beauty of movement and give aesthetic value to the execution". Urzeala highlights the main aspects through which sport is at border with art in the annex 3 (Urzeala, 2018).

In addition to sports being an inspiration for many artists in the past and present such as all the actors in sport-themed movies or in the opening and closing ceremonies of the Olympic Games (Urzeala, 2018), it can also help artists in their education. Artists can have physical education present in their day-to-day life. The actor's profession, for instance, requires physical coordination. So, their educational program includes activities such as gymnastics, dancing and games, wrestling or martial arts, where they study stage movement and body expressiveness. An actor, throughout his/her entire career, needs the rigor, discipline and consistency of the training practiced by professional athletes. So, the athletes' techniques and trainings provide effective solutions for the actor's education (Milea, 2017).

Collaborations between sport and the arts can help increase the audiences for both and stimulate communities to experiment and become active participants. The arts can change the sporting experience and communicate different messages of what sport

is, widening its audiences. Sport and art's cooperation offers an opportunity for good promotion and public relations, opportunities to gather funding and to create programs within the community, promoting cultural citizenship (Long & Sandle, 2018). Sport and art fields offer an opportunity for teachers to know students better, their needs and skills because they are comfortable and in a more informal environment. School curriculum needs to address the growth of students' emotional and social aspects, so they are prepared to deal with real life problems. Subjects like art and sports should be taken into more consideration to address this need and improve education (Talebzadeh & Jafari, 2012).

### **3. Primary research**

When any project is being developed, research is crucial so we are well informed about studies that may support our project. In addition to the literature review, where existing information from different authors was gathered, a primary research was elaborated. This primary research was conducted through questionnaires. Four different questionnaires were created to four different target groups. They were "Students from primary and secondary education" (Q1), "Young adults/recent high school graduates" (Q2), "Students' guardians" (Q3) and "Teachers of primary and secondary education" (Q4) (Annex 4). The number of responses of each questionnaire was 82, 68, 61 and 120, respectively. Even though it is a small sample and we can't generalize the results, it gives us an idea of what people think about the Portuguese education systems and the importance of the arts and sports in education.

In Q1, most students that responded are in high school, in the Science and Technology Course. When asked if they attend any extracurricular activities outside school, only 15,52% responded "no", mostly due to lack of time, and the ones that said "yes", responded mainly sports as their extracurricular activities. The majority likes sports and practices it in school in PE classes. The ones that don't have it in school is because they have it outside school or aren't interested. On the other hand, regarding the arts, most said they like it, but they do not have it in school because it is not part of their course. Most students responded "Frequently" or "Sometimes" to participating in school activities but 13,73% also answered that it isn't common to have many activities in their school. In the following questions to agree or not with the statements, most students agree that all subjects should be considered equally important but 22, 92% don't agree or disagree and 20,83% don't agree with it. Only 2,08% disagree that the

education system is more focused on tests rather than on the student's learning and the majority also doesn't think that the assessment system is the most appropriate. 76,6% of the students would like to choose different subjects in high school that aren't part of their course. Photography and first aid training were the most selected subjects from the proposed ones. In the last open question asking if they would change anything in their educational experiences if they could, there were many different responses. The ones that stood out were: "The learning should be based on practical activities, in the interaction with society and in building a professional future"; "I would change the teaching methods because, in my opinion, the traditional method is not adapted to all types of students"; "If I could, I wouldn't have chosen something so definitive in the 10<sup>th</sup> grade and could have chosen which subjects interested me"; "Have the opportunity to try other subjects that aren't part in the curriculum to gain more knowledge in other areas". (Annex 5)

Recent graduates from high school responding to questionnaire 2 were from the Science and Technology Course as well and they are currently working and/or studying in the university. 81,16% had extracurricular activities outside school, mainly sports, and the ones that didn't have any activity was mostly due to lack of time or they weren't interested. The 4,76% that didn't have sports in school was because they had it outside school, but the majority had also sports in school, especially volleyball and several sports in PE. Only 1,52% responded not to like art but from the 98,48% that like it, 54,55% didn't have art classes in school, again mostly because it wasn't part of their curriculum or because there weren't any in their school. The ones that had art classes were predominantly visual and technologic education and music. "Sometimes" was the answer to most people when asked if they participated in school activities and 22,58% said "Rarely". When asked if they agreed with some statements, the majority agreed that all subjects should be considered equally important but 22,58% didn't agree, most agreed that the education system was more focused on test rather than on student's learning and disagreed that the assessment system was the most adequate. 89,9% answered they liked to have had the chance to choose different subjects in high school outside their course, especially photography, first aid training, other languages and dance. In the final and open question about the changes in their educational experience, many said that it should be given the opportunity to students to have more subjects outside the mandatory curriculum, there should be more freedom of choice and more offer not only of art and sports but also of personal development. The teaching process



should be more towards actual learning than exam results. Some answers were: “a system that takes more into consideration the individuality of each student”; “...a subject that throughout the years explained the different forms of art would be an excellent way to promote culture in society”; “I think my school should support art and sports. For me it wasn’t a problem because I had those types of activities outside school because my parents educated me that way. But for other kids that didn’t have that type of example at home, could have become better and more active with that kind of incentive. In my view, the school should have that responsibility. Educate. The arts and sports are a part of a person’s education. Especially, in a private school.” (Annex 6)

The guardians that responded to the questionnaire 3 had their oldest child mainly graduated from high school or in primary education. Children in high school were mainly in the Science and Technology Course. They were asked if they agreed or not with a series of statements. Most guardians didn’t think all students’ needs are addressed in the current education system. The majority agreed that all subjects should be considered equally important but 31,25% didn’t. Only 4,69% didn’t agree that the education system is more focused on tests rather than on student’s learning, No one disagreed with the importance for children to have free time after school. 93,75% answered that their child attends extracurricular activities outside school and the 6,25% that didn’t is 100% due to the child’s lack of time. The main extracurricular activities mentioned were sports. 100% answered “yes” to the question if they considered the arts and sports important for education. The main reasons pointed out are that it helps in the psychomotor, social and personal development, the development of other important competences, it fosters civic values, a strong personality and self-esteem and complements the skills acquired in other areas. Art and sports are part of any country’s identity and it helps with the global development of any child. No guardian disagreed with the statement that a school integrating arts and sports programs benefits the students and most also agreed that it is important for children to be able to choose different subjects in high school outside their course. In the last open question about what they considered most important in their child’s education, a series of responses emerged. Some ideas were frequent in the responses, such as the values transmitted to the children, educating children to be correct and active citizens in society. Many mentioned that it is important to have broad and versatile programs that are adapted to today’s world, offering many different experiences and that foster other competences besides scientific or literary competences, like critical thinking. There must be a balance

between different learning and leisure and take the children's interests into account, so they are motivated to pursue whatever they want. (Annex 7)

The last questionnaire (4) was addressed to teachers of primary and secondary education. Teachers that responded it teach all kinds of subjects, such as PE, English, Science, Mathematics, Portuguese, History, Geography, Economy, Drawing, Physics and Chemistry and Musical Education, so we have the insight from teachers with different contexts on how they view the Portuguese education system, the arts and sports. When asked how often they collaborate with teacher from different subjects, most said "Sometimes", 25,19% "Frequently" and 25,19% "Rarely", which means collaboration between teachers is still not very implemented. In the questions to agree or disagree with the statements, 78,9% didn't think all students' needs are addressed in the current Portuguese education system, most agreed that all subjects should be considered equally important and that the education system is more focused on tests rather than on student's learning. The majority also disagreed with the assessment being the most appropriate and almost every teacher agreed that it is important for children to have free time after school. 99,19% considered art and sports important for education for several reasons. Some of them are because they explore different aspects from most subjects, more diverse competences are developed, such as concentration, teamwork, discipline, resilience, emotional control, and they allow each student to explore his/her individuality and be creative. "Both have a fundamental part in self-knowledge, in developing social, artistic and cultural competences. Sports, in particular, if well advised and conducted, can lead to the acquisition of values like health, cooperation, respect, friendship, justice, multiculturalism, commitment, defeat, values also fundamental for the development of an integrated and balanced personality in society". They are essential for the integrate development of an individual. Only 0,81% "totally disagrees" with the statement that says a school integrating arts and sports programs benefits the students. The majority also agreed that it is important to have a varied offered since the 1<sup>st</sup> cycle and the opportunity for students to choose different subjects in high school outside their course. If they could change anything in teaching in Portugal, teachers said they would change curricular programs, schedules, assessment, the contents (be adjusted to students), the national exams and exchange them for specific exams from the universities, the number of students in each class (smaller), theory for practical, the excessive bureaucracy that take time from teachers to think of innovative activities, the oldest faculty for younger and the mandatory subjects. They

think it should exist multidisciplinary planning since the beginning and the most common comment really was changing assessment and the curriculum. (Annex 8)

Despite the small sample, it is possible to observe that, in general, the four targets would change many things in the current Portuguese education systems. It is very restricted and test-oriented, instead of being adaptable to the students and offering a diverse range of options. Many agree with having the opportunity to try more subjects that are not very common or do not exist at all in the current curriculum, such as first aid training or photography, to integrate more art and sports in the curriculum and adapt the content and the assessment system to the students and the current world. Education is not only about the academics but also about transmitting important values for the society and educating children to become responsible citizens. Guardians and teachers wish for children an integral education that offers all the resources for them to succeed in the field they choose to pursue.

#### **4. Main conclusions from literature review and primary research**

From the developed literature review that focused on different models and approaches to education and key aspects, and the development of questionnaires to different stakeholders of education, we can conclude the following:

- Curricular flexibility is important in order to better satisfy students' interest. If the school offers a wide range of subjects and opportunities, students can choose the ones that best fit. Besides having the traditional subjects that are obviously important, more subjects must be offered to complement the educational experience and help children develop skills to use in their real personal and professional life. The more diverse education is, the richer the society becomes.
- Creativity and innovation are part of today's society and schools must be prepared to address that and other issues. Students should feel comfortable to be creative and given room to explore.
- Sense of community and citizenship are key since the world is facing so many problems. This means children need to be familiar with these in school so they can apply it later in life and become responsible citizens. They should develop a sense of community and help towards others.
- Art and sports are very important in education. They aren't just a form of entertainment, but they provide different experiences to children that allows them to develop competences that aren't developed in other academic subjects,

such as teamwork, leadership, responsibility, commitments, relationships with others, sense of culture, psychomotor skills, healthy habits and critical thinking. Art and sports are part of a country's culture, so it makes sense that children have contact with it since they are young. Being aware of it, they will take it to their personal life and value it. They will help develop the society, increase cultural awareness among the population and fight the misconception that they are useless and that a career in those fields is not worth it.

- Offering arts and sports in schools increases access to children that wouldn't have the chance to attend these activities outside school. It is important to guarantee that every child has access to a rich education in the arts and sports, regardless of their socioeconomic background.
- Assessment should be adapted to the subject and the student. Knowledge can be evaluated in a written test and many students may not know how to express their knowledge in writing but in a different way, like in a presentation or a play. It is important to have practical assessment rather than just theoretical because once they leave school, they will have to apply the acquired knowledge in real life situations and not on a written test. Teaching should focus on the real learning rather than on test preparation and results, so students really learn instead of memorizing it for the test and forgetting it right after. If they enjoy the experience of learning, they will feel less stressed and will learn better.
- To successfully implement any innovative program or making changes in the curriculum, there must be commitment from the students, teachers and administrators. Teachers and administrators must work together to learn from each other and create the best programs for students. Also, a strong leadership is fundamental and a good communication to parents as well, so they are aware that the school is doing its best for their children.

After concluding this, creating a school in Portugal that offers all of that is very important. Portugal needs to take in good examples around the world and offer a more diverse education so all students can find the perfect environment to learn. Having art and sports in the same school can be beneficial. Since everything is in the same place, guardians do not have to drive their children to the activities and students save time. The school can take advantage of the different spaces and the potential of each field and

*Business Plan*

*Implementation of a school from 1<sup>st</sup> to 12<sup>th</sup> grade with integrated arts and sports programs*

interrelate the two. It also increases the audience and participants for both since all students are in constant contact with both.

## **5. Project description**

### **5.1 The concept**

Portugal has been developing new policies and initiatives to improve education. With those bared in mind, in addition to the example of MI theory, IB programs, different education systems and innovative schools around the world, a project for a new private school in Portugal, named Academia Geração, will be developed in this chapter. The school will be based on principles and values from different sources, such as the one withdrawn from the literature review and primary research, which support a rich educational experience for students and focus on the arts and sports. These industries are still not much explored in the Portuguese education system and given the right value in society but they are growing. This is an opportunity for more professionals of those industries to want to invest here instead of looking for opportunities abroad.

As the world is becoming more demanding and crowded with information, a uniform education does not make sense anymore. People are different and have different interests and capabilities. So, the idea is to have a school that offers a wide range of disciplines to reach more students. Academia Geração will have the decree law 55/2018 as reference for the mandatory disciplines and hours spent in each but it will have more subjects, projects, programs and flexibility for students.

The school offers the opportunity for students to have a variety of disciplines and prepare them for a career in the arts or sports if they wish. Because both sports and the arts are very competitive industries and hard to pursue, it is important for a person to attend a school that provides all the tools needed to take on the challenge from a young age. The school also offers the chance to fight the stereotype of the arts and sports as two useless careers and two completely opposite worlds that do not mix. Moreover, the school focuses a lot on issues everyone should learn about, such as citizenship, health education, politics, problems of the world and basic life skills, which are approached in different subjects available on the curriculum and which every student has contact with.

The idea is to provide an education, which allows students to have decision-making power over their curriculum and their future. Students' choices won't be restricted to the mandatory subjects and course choice when they reach high school. Instead, they will have the flexibility to take different classes and activities that improve their school experience and make it more exciting. All subjects will be taken seriously and given the same importance because they all play their own role in a person's

education and growth. That idea will be bared in the mind of every teacher and administrators. Teachers from different disciplines must collaborate to find the best teaching approaches and connect the materials from different subjects and real life situations. Academic teachers must be opened to the other disciplines and make their classes more dynamic and attractive. If students relate to what they are learning and give meaning to it, they can learn better and acquire knowledge more easily. As Benjamin Franklin once said, “Tell me and I forget. Teach me and I remember. Involve me and I learn.”

## **5.2 The market**

The market for this school is the Portuguese students living in Lisbon. Even though it is a private school, there is a percentage of disadvantaged children attending the school as it will be discussed further, so they make up the market as well. The school targets are any student who wants a more diverse education than the regular schools offer. Children who want to study art or sports and can not do it on a regular Portuguese public school or can not attend those activities outside the school.

### **5.2.1 Portuguese education outlook**

Portugal has one of the longest periods of compulsory schooling in the OECD countries, 12 years of schooling from age 6 to age 18. It is divided into basic and secondary education. In basic education, there is the 1st cycle (1st to 4th grade), 2nd cycle (5th and 6th grade) and 3rd cycle (7th to 9th grade), secondary goes from 10<sup>th</sup> 12<sup>th</sup> grade. In annex 9 there is the structure of the Portuguese education system. Every student has the same curriculum until the age of 15. In the 10th grade, students have to choose between four humanistic-scientific courses and professional courses, which are more work-oriented rather than orienting towards higher education. By choosing one of the courses, students will be restricted to the pre-set subjects for that specific course, not having the chance to attend different classes. For instance, Science and Technology Course students can not have a History class. Moreover, if they change their minds regarding the course they want to pursue in the middle of secondary education, they have to repeat the 10th grade in order to change courses and start over. Many students change courses in secondary education because they are not sure what they want or they feel pressure from parents and society to choose something that it is not what they actually prefer. They have to make an important decision when they are only 15, a

decision that may restrict their choices later in life, when applying for a university, for instance. Students are evaluated internally and externally. Each school and subject has its own assessment criteria to evaluate students' performance throughout the school year. Adding to the internal evaluation, students have to take on national exams in the 4th, 6th, 9th, 11th and 10th grade. The exams' subjects are Portuguese and Math until the 9th grade. Once they are in secondary education, the subjects of the exams depend on the course they are taking. A percentage of the internal GPA in addition to a percentage of the national exams results composes the applying grade for the university. Each university requests different national exams, depending on the field of study, and there are minimum grades in order to be able to apply.

Portugal has been making an effort to extend the educational offer and make it inclusive by eliminating obstacles and stereotypes and encouraging diversity. The DL55/2018 states as a priority to have an educational policy that is centered on people and that guarantees equal access to opportunities, promoting educational success. All subjects are valued and all activities and school projects should be included in the curriculum. For that, there is curricular autonomy and flexibility. Schools have the opportunity to manage the curricular-based matrix and the workload. They should focus on a multilevel approach by adjusting the curriculum to the students' potential and difficulties and having "complementary offer" by creating new subjects. Students, parents and teachers are seen as key agents in curricular development so students, so it is a goal to allow students to construct their own curriculum according to their characteristics and interests, allowing some subject chances and replacements.

With the education offer diversifying by providing alternatives, such as the professional and vocational courses, more and more students are pursuing those (Annex10). This shows that it is important to have a wide range of activities and varied in order to address the needs of all types of students. In addition, the Ministry of Education has recognized the importance of organizing schools with schedules where there is time for other activities such as sports, music and English and that are compatible with families' needs at the same time (Ministério da Educação, 2007). A survey was developed by the Ministry of education in the school year of 2017/2018 to all public schools from Mainland Portugal. The survey-collected data on the number of students attending activities to enrich the curriculum that usually take place after school hours. From the total of 319 409 enrolled students in the 1st cycle, 85,4% attended activities to enrich the curriculum, mainly in sports and artistic domains (DGE, 2019).



Every school has one or more art subjects since it is mandatory in the national program but, for a more deep and complete arts education, there are some artistic specialized courses that some schools offer. The curriculum is adapted and integrates the arts in it with specific subjects in secondary education. Even so, the offer is still little. Regarding sports education, physical education is part of the national program as well and mandatory. Students have it in all school years and they practice different sports in each class, depending on the resources the school has. Moreover, schools may offer sports for students to practice after school hours or as part of “School Sport” program, where students can compete with other schools. Other than having some sports as extracurricular activities, there is not a program integrated in the curriculum where students really commit to a sport and learn everything that it involves.

Parents can choose which school best fits their child from a variety of choices that exists now. They have public, private (independent from the Government) and Public and Private (dependent from the Government) schools around the country. To attend public school, students go to the one belonging to his/her residence and in private, they have to go under an admissions process. Each private school has admission criteria that usually includes an interview/meeting with the parents and child and an assessment test.

### **5.2.2 Structural documents and legal framework**

The general framework of the Portuguese education system is established by Law no. 46/86, 14th October, which was subsequently amended by Law no. 115/97, September 19th, 49/2005, August 30th, 85/2009, August 27th (Eurydice, 2019) and 65/2015, July 3rd (Inspeção-Geral da Educação e Ciência, 2017). This law establishes all the basis of education in Portugal, how it is organized, the goals of each school level, the resources, the administration of the education system and its evaluation. In the latest amendments, the compulsory schooling was extended to what it is today, from 6 to 18 years old. For cooperative and private teaching, there is a specific law that approves its bases, which is Law 9/79, March 19th, later altered by Law 33/2012, August 23th. The Decree-Law 553/80, November 21st was based on a pedagogy structured very dependent on the public education system, so Decree-Law 152/2013 comes to propose a model that opens the door to a more autonomous reality.

It is a government’s priority to ensure an education policy that is centered on people and promoting equal access and opportunities. The Decree-Law 55/2018,

establishes the basic curriculums to the basic and secondary education, its guiding principles, operationalization and assessment of learning, in a way that ensures every student acquires the knowledge and skills required, in every school, public or private.

Having the goal of promoting the best learning approaches to students, schools must have autonomy to develop the curriculum that best fits its context. Portugal has established a series of documents and projects that guide schools to develop and manage the curriculum locally. It is all part of the Curricular Flexibility Project, which allows a more flexible management of the school curriculum.

**Student's profile when leaving compulsory schooling** – It underlines the principals, vision, values and competence areas that are expected a student to have when he/she finishes school. It is intended to have a reference that, respecting diverse educational paths, it ensures consistency to the education system (annex 11).

**National Strategy of Education to Citizenship** – It intends to guarantee the integration of a set of rights and duties that should be included in every child's education so, in the future, they benefit interpersonal relationships equality, integrate differences and respect human rights and democratic values. Each school defines its own approach to incorporate and reinforce citizenship education.

**Essential Learning** – Documents with curricular guidance for planning, execution and evaluation of teaching and learning. For each year and subject, Essential Learning defines the knowledge, skills and attitudes to be developed by all students.

In addition, an Arts National Plan was presented for the years of 2019 to 2024. Its goal is to make the arts more accessible to citizens, especially to children and young people, through the education community. It is intended to encourage cultural engagement of the communities and organizations and develop partnerships. (DGE, 2019). As it is stated in the guiding principles of DL 55/2018, the arts are part of the structural components in every curricular base.

### **5.3 School curriculum**

Focusing on the arts and sports curriculum, students start from a more general education and it converges into intense specialized training until the last year of high school. The arts will be organized as visual or plastic arts (drawing, painting, sculpture), multimedia (photography, new media and contemporary) and performing arts (theater, dance and music). Regarding sports, students have physical education (PE) so they can

try as many sports as possible but will also have different sports available to sign up for, which are organized according to the Sports Education Model by Siedentop. Students choose a sport to do for an entire season so they can really engage in it, learn about the different roles in it, about responsibility and commitment and how to be a team player.

During the 1st and 2nd grade, students will be able to have contact with different forms of art such as drawing, painting, dancing, theater and music and different sports as well to help them learn important life skills in a less divided approach and more interrelated. They will gain an appreciation for the arts and sports since a tender age and get to know the different opportunities they can choose in the future years. In the 3rd grade, students choose an art class and one sport to dedicate more of their time in and perfect their skills in it. They will start to deepen their knowledge on those and compromise to something important.

As they continue to the 5th and 6th grade, students will have an increase in hours and demand in the chosen art class and sport. As they reach the 7th grade, as their academic subjects increase in difficulty, they have to make a choice between the arts and sports. In the 10th, 11th and 12th grade, instead of being in one course with pre-defined subjects, they will be able to create their curriculum. Portuguese, Math and English are mandatory for everyone and the others subjects are chosen with the help of a counselor. As they create the curriculum, they will continue to pursue the arts or sports.

Along the way, as students make choices between art classes and sports, they will continue to have the opportunity to try and attend different classes from the chosen one as long as it does not compromise their performance on the other subjects. For instance, the art students will have mandatory PE and students taking dance will have sporadic theater and music classes to complement their dance training. In addition, all students will have mandatory swimming lessons from the 1st to the 6th grade because it's a fundamental skill to have, especially in a country that is surrounded by ocean.

Beside the academic and arts and sports programs, the school offers different subjects, such as photography, first aid training, debate (to discuss world issues), cooking and sewing and others, to gain basic knowledge and competences any world citizen needs. Moreover, it is important to help the community and be an exemplary citizen. That is a habit students can acquire since they are young, so all students will have a community project each year they have to participate in and it will be included in their evaluation. In the schedules, there are also free periods for studying, doing

homework or working on projects. As it happens in MI schools, presentations, portfolios and projects displays are constant in Academia Geração in order to offer different assessment tools, for students to become comfortable with exposing their work and for them to learn how to evaluate themselves and their colleagues as well. It is demanding and challenging having many presentations because it is hard work and makes students vulnerable but it is enjoyable and fulfilling at the same time. Teachers define how students are assessed in each subject so it is adequate to what it is being taught.

As the world is becoming more globalized, it is essential to be connected to other countries and cultures. All students will have mandatory English classes since the 1st grade and a mandatory additional language from 7th to 9th grade. Students are encouraged to participate in international experiences like going to Spain for an intensive Spanish course during a school break or receiving exchange students at home. The school is constantly promoting international programs for students so they can get in contact with different people that may remain in their lives after the program is over and they learn to see the world from different perspectives.

As the school offers good conditions for students to study and create their projects, they can stay later in school, until 7p.m and it won't be charged an extra fee because the idea is for students to take advantage of the school facilities. Older students (7th to 12th grade) can book rooms in the school to use on Saturdays or after 7p.m on school days. They have to inform the school with 10 days notice. To book after that or even on the same day, it will only be possible if it is still available because the school also allows external people to rent spaces, like the gym or the outside sports field, in non-school hours. The gyms, dance rooms, theater and outside sports field can be rent from 7p.m to 11p.m from Monday to Friday, from 9a.m to 11p.m on Saturdays and Sunday from 9a.m to 8p.m.

When there are school breaks, camps will be available. Students can spend their Easter or summer break (July) participating in different activities the school offers. There will be specific programs for the arts and sports but also less specific programs with different activities, such traditional games, community service, science or technology challenges. These camps are charged a separate fee (150€ a week) and children have to sign up for it.

In annex 12 there is a proposal of the curriculum offer with the subjects available for each school year and respective hours.

#### **5.4 Counseling and curriculum management**

Children can be influenced by what they see on TV, social media or by what parents say and, many times, they do not make the best decisions for them because they are not well-informed. That is common in their school life and academic career. It is important that a counselor is assigned to each student to guide him or her throughout the years in school. Counselors help students designing their curriculum and choosing which subjects to take according to his/her interests and characteristics. They also provide guidance when it comes to choosing the course to pursue in the university. Before deciding which university to apply to, many other opportunities and experiences arise, such as internships, volunteer work or experiences abroad. Counselors will be constantly informed with the latest opportunities and will advise and help students to live those experiences. They establish partnerships and function as a bridge between students and companies, organizations or sport teams, for instance, that provide the opportunities mentioned before. The counselors, along with teachers and administration, have a monthly meeting to evaluate the decisions made regarding the curriculum, the teaching approaches, the school strategies and new projects. They must guarantee they are doing its purpose and if not, make improvements. Being a new school with some varieties and new challenges, it is crucial to monitor that everything is going according to plan. Teachers play an essential role in assessing if the approaches are working or not.

#### **5.5 School strategy**

The school is a private school to be able to offer more resources and activities to the students. Being a private school, there is a bigger freedom when it comes to making decisions about the curriculum structure and the teaching approaches used in the school. Nevertheless, private school shouldn't be elitists as it happens in Portugal according to OECD (Observador, 2019). In many countries, private schools are fully funded by the Government, allowing students from all social backgrounds to attend private schools if they choose to. Portugal is not an example of a country doing that. Families have to pay for their children to attend a private school. Even though the Portuguese Government supports disadvantaged families, there has been much alarm regarding Government support with cuts on those funds. Due to that fact, partnerships with private companies will be established to help support students coming from low-income families. Companies can choose one or more students to support and pay them the school fees so

they can attend Academia Geração and benefit from its characteristics. In addition, in extreme cases and in the case of need, the possibility of a percentage of the school's profits being reverted to those students in need may be analyzed. Every class will have 10% of the students coming from disadvantaged families. Those students will have to go under an interview to understand their financial circumstances and see if they have the profile for the school.

A good education must start from an early age and accompany students until they are ready to face the world of adulthood. Teachers can also do a better job in teaching if they know the students well and follow their growth because they will know them. For these reasons, the school will be from the 1st to the 12th grade. However, the school is meant to be a small school, so teachers can connect and get to know the students, as said. Every grade has 2 classes, each with, on average, 20 students as it happens in most OECD countries (Annex 13). It is intended not to have over 25 students in one class. As the school grows and more students are interested in attending more students, the opening of one more class a year can be analyzed.

When creating a school, time and money can be major roadblocks because are two resources that can be very limited in schools, as Koff & Kramer stated (2001). This means that a smaller schools and lower grades is a good way to start implementing change and new resources. Furthermore, if art and sports education must accompany students from the beginning to the end of the school years, it does not make sense for students to start it in the middle of their school experience, so the school will open with lower grades only (from 1st to 4th grade) and more school years will be created as the students move forward. It will gradually grow, providing an opportunity for the school to find more funds and to plan and define the next steps to take. Teachers and administration can evaluate how the students react to the system and the school and make adjustments if needed. It must be teamwork since the beginning.

As it is a big investment, not only money wise, but also, in education, the school, in the beginning, will only offer dance as a performing art because it is gaining a lot of recognition (with sporadic theater and music classes lectured by an invited external teacher to complement the dance education and training) and 2 sports of choice, gymnastics and volleyball. Gymnastics because the number of federated athletes has been increasing over the years and volleyball because the number of federated athletes is large as well (Annex 14). Also, both sports can be practiced in PE gyms, which saves money and maximizes the use of the space. As the school grows, the goal

is to increase the offer by having all performing arts, fine and visual arts, more sports and new subjects that may be important. Swimming lessons are mandatory as mentioned but they will take place outside school because a pool requires an investment that can be dissolved through a partnership with a local pool.

All students attending the school wear a uniform so they are not judged by their clothes. The idea is to have a diverse population but all considered as equals. The uniform is simple in order to be sold with lower prices and to be comfortable. It is composed by two t-shirts (white and grey) and a sweatshirt, which are purchased at the school and jeans, which is of the responsibility of each student. The schools offers the two t-shirts and sweatshirt to the low-income students attending the school.

### **5.6 Location**

The location chosen to open the school is Lisbon, Portugal. Lisbon is the capital of Portugal and the biggest city of the country with a population of 2 846 332 (INE, 2019). The Metropolitan Area of Lisbon had 484 537 enrolled students from preschool to secondary education in the school year of 2017/2018, as we can see in annex 15 (DGEEC, 2019). The Lisbon Metropolitan Area is also where many companies and organizations are located which can be good for the school in order to establish partnerships and encourage students to experience culture in a city that is culturally rich. In addition, since it the capital, accessibility is also very good. There are many transports available and it is easy to get everywhere despite the constant traffic. Even though there are many competitors in Lisbon, there are also many customers.

### **5.7 School Environment/Atmosphere**

A school is where children spend a lot of their time, so it is important to be a place where they feel comfortable and welcomed. The design is very simple and with the use of wood but colorful at the same time to transmit simplicity, happiness and life. The entrance of the school is welcoming with the school values displayed, so it is the first thing students see when they walk in. There is also a receptionist to welcome them and guarantee parents are there to pick them up at the end of the day. The whole school but especially the entrance corridor is covered in students' work and projects not only for students to look at it, but also, to demonstrate to parents what is done in school. The rest of the school has many encouragement phrases and goals so students are in a positive environment.

Each class does not have an assigned classroom for every subject. Instead, there are classrooms with themes for each subject and students and teachers rotate among them. Teachers organize the classroom according to what is being taught there and ensure that all the needed materials for that specific subject is in one place. This way, students are involved in an environment related to the contents. Each student has a locker so he/she can storage all the school supplies. This allows them to take home only what is necessary and it is a way to encourage students to do all their homework at school, leaving time for them to play and spend time with family and friends after school.

There are different areas and spaces where students can spend time before or after classes. There are areas for students to work on their projects, where creativity is encouraged, areas to study and also areas to hang out and get to know their colleagues. The outside is ample with many tables and chairs and games because it is important to encourage children to spend time outside playing. There should be a space for everything so students want to spend time there and feel they can do anything there. According to the activities that the school offers, there must be a place that allows those activities to occur.

- Two gyms - works for PE, gymnastics and volleyball
- One music room - ample room with good acoustics, different instruments and a sound system
- A theater - works for the theater classes, for dance recitals, music recitals, school ceremonies, presentations and other school events
- Two dance rooms
- Outside sports field

A teacher is a key stakeholder as well, which makes their comfort a priority. Having a good teachers lounge is needed so they can meet and exchange ideas to make interdisciplinary work and come together to educate students. A bar, a cafeteria, a doctor's office, a library, a stationery shop and an administration office are other services and spaces the school has.

### **5.8 School admission policies**

Students must apply to enter the school. Everyone would benefit a school with these characteristics but some may benefit even more and it is not possible to take in everyone. There must be an admission's criteria in order to select the students that best



fit the school. Students must apply to the school to enter the 1st grade so they can have this approach to education since an early age and following their entire school experience. The school will evaluate applications from candidates for other grades as well. Many students may have had art or been a part of a sport outside their previous school and intend to continue it in our school. They must have had experience in those fields and show ability to adjust to the school's characteristics in order to enter in a different school grade. Students must apply according to the following steps.

- Fill out a form online with the basic information (Annex 16).
- Visit to the campus and meeting with a counselor - the counselor will collect information on the child's interests and abilities in the arts and sports. Previous experiences on those fields will be taken into consideration, especially for students applying for grades higher than 1<sup>st</sup>.
- Assessment - test that evaluates the child's basic knowledge of academics and his/her personality and tastes.
- Application review - counselors will revise all applications along with administration members to decide which students will attend the school the following year.
- Acceptance and welcome - the school will contact the family to inform the acceptance of the child and all the information for the school and welcome week will be transmitted.

## **6. Market Analyzis**

### **6.1 Competitors**

When running a business, it is crucial to know our competitors in order to understand how we can be competitive. A selection of the 10 main competitors was made. The competitors chosen are the ones that have the most similar characteristics to the Academia Geração, that complement the Portuguese academic program with different approaches, activities and projects, while valuing the arts and sports in education. The characteristics considered for the analysis were the school fees, the educational project (school years, curriculum), the activities offered, target, number of students and location. All the selected competitors are located in the Lisbon Metropolitan Area. The competitive advantage of each competitor is laid out as well.

The private school is situated on a farm in *Meleças, Sintra*. Most students' parents have tertiary education and are attracted to the school for its innovation, professionalism, new technologies, and the relationship between teachers and students. Students attending the school (from preschool to secondary education) come mainly from the area of *Sintra* and some from *Amadora*. The school intends to be opened to change and offer an education that places the student as the main intervenient on the learning process. It provides an integral education, including aspects such as ethics, entrepreneurship creativity, mutual help and collaboration, autonomy, solidarity and tolerance. The curriculum has the national programs as a reference but it is adapted and complemented with different didactic interventions and teaching methods. Adding to the regular curricular, the school offers the following activities students can sign up for: Swimming, Back horse riding, Tennis, Ballet, Dance, Gymnastics, Karate, Soccer, Judo, Guitar, Robotics and Electronic Program and Theater. Lastly, an extension of the Music Conservatory has been implemented in last October, allowing students to have their musical education in the same place as the rest of the classes (*Colégio Vasco da Gama, 2017*).

#### ***Escola Casa da Floresta***

A private school from preschool to 6<sup>th</sup> grade located in the “lungs” of Lisbon, in *Monsanto*. Based on the Waldorf pedagogy with each child as unique, the school believes in respect for nature and ecology. Portuguese and mathematics are taught with an artistic component and the outside spaces such as the forest, the garden and the vegetable garden are used as much as possible so students are familiar with different natural elements. The food is also biologic with many vegetables and fruit and it is prepared in the school (*Escola Casa da Floresta, 2019*).

#### ***Colégio Cesário Verde***

This private school is in *Marvila*, Lisbon and it is for children since nursery until the 9th grade. It bets on the integral education of the individual and it uses the arts in the learning process. The arts can help make the connections between different domains (ethical, social, cognitive, psychomotor and aesthetic) and help develop the academics. Its artistic offer (dance, theater, music and visual arts) is present in the students' entire educational experience because it is believed that if they have contact with the arts since the nursery, they will be more open to it in the future. The school has performing arts,

dance, music, sports (swimming, volleyball, judo, gymnastics) and “The Inventors” Club, “Happy Code” Club and a Science Club. Students attending the school come from different social, economical and cultural background, which creates a heterogeneous environment of sharing. They tend to remain in the school for all school years, allowing a good consolidation of the learning experiences. Students are demanding and curious because they feel they are in the center of the educational process and have been taught that since the beginning so the school must respond to that need (*Colégio Cesário Verde*, 2019).

### ***Colégio Pedro Arrupe***

*Parque das Nações*, Lisbon is the location of *Colégio Pedro Arrupe*. It is a private school from preschool until secondary education, based on ignatian pedagogy. Students go through a demanding education, following the regular Portuguese academic program. Due to its closeness to the river, a transversal curriculum was created to value knowledge about the sea in every subject. Every student is involved in nautical activities as part of the PE program. Other activities to enrich their curriculum are also available, such as creative dance, soccer, volleyball, rugby, judo, tennis, karate, theater, gymnastics, hip hop, cinema and inventors (programming, robotics, electronics). Each student pays a monthly fee for the mandatory curriculum and extra fees for the additional activities. Pedro Nuno Baguete fund helps students from disadvantaged families attending the school (*Colégio Pedro Arrupe*, 2019).

### ***Academia de Música de Santa Cecília***

A private school with an integrated music program based in Ameixoeira, Lisbon. The idea arose from the wish to offer an artistic and musical teaching, with the courses from the National Conservatory, along with the regular Portuguese academic program. Students who want to pursue a music career have strong academic education and students pursuing other courses receive a good musical education as well. The extracurricular activities it has are swimming, volleyball for the 5th and 6th grade, futsal from 5th to 9th grade, ballet and judo until the 4th grade, chess and drawing and painting atelier until the 9th grade. The monthly fee covers the mandatory educational course and the offered activities, transportation, school meals and integrated music program have extra fees (AMSC, 2019).

### **Dance School of the National Conservatory**

The school is located in the historical center of Lisbon and it is fully stated funded. It integrates the dance-training program with the academic middle and secondary education (from 5th to 12th grade). The dance-training program is based on classical ballet technique along with modern dance training. Students have the chance to have rigorous dance training in the same place they have the academic classes (EDCN, 2019).

### ***Colégio São João de Brito***

This private school educates a community with an ignatian vision, in *Lumiar*, Lisbon. The school defends an integral education of the individual based on three dimensions, personal and academic, social and religious dimension. From preschool to secondary education, students follow the regular Portuguese academic program and with a commitment to the community being a priority. The catholic school complements its academic education with extracurricular activities, such as personal and religious development activities, several sports, games and arts for students from 1st to 6th grade, foreign languages, creative sewing, theater, swimming, tennis, handball, soccer, gymnastics, volleyball, piano, guitar and math club. There are also three annual projects, Eco Schools (activities about sustainability and the environment), Junior Achievement (entrepreneurship project) and *Tarde Magis* for 7th graders (meetings to discuss and learn about different topics like survival skills or cooking). The extracurricular, school lunch and other non-mandatory activities are not included in the monthly fee (CSJB, 2019).

### ***Colégio de São Tomás***

*Quinta das Conchas* is the place chosen for this Private Social Solidarity Institution (PSSI). It is a non-profit institution that provides support to families and students that would not have the chance to go to a private school. It educates students from preschool to secondary education and provides an education based on Christian tradition. The curriculum is based on the regular Portuguese academic program but it is complemented with more subjects, such as German, Latin and Mandarin from the 5th to the 9th grade and a different method to teach Math (Great Math based on the program used in Singapore). The arts are considered essential as well, so there is a curriculum for plastic arts, music and drama. Secondary students instead of being limited to the

subjects of the chosen course, they have a more generalized curriculum than usual at this stage. Portuguese, Math, English, Biology, Physics, History, Philosophy, Art, PE and Religion are the classes for secondary students in *Colégio de São Tomás*. It also offers extracurricular activities (not included in the monthly fees) - Programming and informatics, Guitar, Ballet, Fencing, Judo, Karate, Taekwondo, Music, Gymnastics, Soccer, Basketball, Volleyball and Photography (*Colégio de S. Tomás*, 2019).

### ***Escola Artística António Arroio***

This school offers secondary education (10th, 11th and 12th grade) based on the visual and audiovisual arts. It is situated in *Olaias*, Lisbon. The educational project trusts the arts and citizenship to build the humanist part of education and to be present on the curriculum development. Students have mandatory subjects that are part of the Portuguese curriculum such as Portuguese, English, Philosophy, PE, Art History, Descriptive Geometry and Drawing, adding to specific arts subjects. In the 10th grade, every student has a common course and in the 11th and 12th grade, students choose one of the four courses available. They are Artistic Production (specialization in ceramics, engraving and silkscreen, jewelry, textile and performance direction), Product Design, Audiovisual Communication (specialization in cinema and video, photography, sound and multimedia), and Communication Design. An activities plan is available to complement students' school experience with known authors exhibitions, field trips, workshops, contests and conferences. Besides the advantages of being an artistic school, it defends teaching approaches that rely on teachers' collaboration, partnerships with different artistic organizations and establishments, interdisciplinary, group projects, inclusion and integration. There is also a percentage of the students benefiting from social support in order to have an education in the arts (*Escola Artística António Arroio*, 2019).

### ***“Os Aprendizes”***

A school in *Birre, Cascais*, where the child is at the center of the learning process and is seen and respected. Its own pedagogy was created based on others like Waldorf or the Modern School Movement pedagogy. Currently, it offers from preschool to 12th grade, with the vision of extending to secondary education and offering nursery as well. As guiding principles, the school has the child's vision, respect for the child's

individuality and a holistic vision of the child. The curriculum as the regular Portuguese academic curriculum and teachers find a theme to connect the different subjects. To enrich the curriculum, the activities available are music, PE, languages (English, German, French and Spanish), yoga, meditation, drama, vegetable garden, philosophy, informatics and volunteer work. The school offers extracurricular activities inside the school (creative dance, karate, “The Art fo English”, “The Inventors”, “In debate” and Bliss Music School) or in establishments of partners (soccer, swimming and tennis). These extracurricular activities, school transportation, lunch and time extension to stay in school later in the afternoon are not included in the monthly fee (“*Os Aprendizes*”, 2019).

The offer of schools in Lisbon is big, there are many options and the differentiation is increasing. To be able to analyze the competition, the schools selected were based on its differentiation and most of them have many grades available. *Escola Artística António Arroio* is the only one that only offers secondary education but since it has an artistic program, it was taken into consideration as well. After observing the table (Annex 17) and looking into all these schools, it is also possible to divide the competitors into direct and indirect. The direct competitors are *Colégio Cesário Verde*, *Colégio S. Tomás*, *Colégio Vasco da Gama* and “*Os Aprendizes*”. Even though the ten schools are all in the Metropolitan Area of Lisbon, these four share more characteristics with *Academia Geração*. They have a similar educational offer. The values and ideas behind it are pointing in the same direction, it does not simply follow the regular Portuguese academic program but innovates in the teaching approaches and complement it with a rich offer of activities and projects.

## **6.2 Substitutes**

In addition to direct and direct competitors, there are other competitors that can fulfill the need that *Academia Geração* is addressing. The substitutes simply fulfill the byers’ needs in a different way, with a different approach. Schools with the IB program are an example for *Academia Geração* but it does not have the regular Portuguese academic curriculum as a reference and complementing it with a variety of methods, activities and projects. Professional schools are also substitutes because they have a different structure and curriculum developed directly for them. Language schools like *Deutsche Schule Lissabon* and *Lycée Français Charles Lepierre*, are substitutes as well

since their educational offered is focused on a foreign language the respective country's education system.

### **6.3 PEST**

#### **Political-Legal Context**

The education system involves all the means to guarantee the right to education by ensuring a continuous training towards the global development of personality, social progress and society's democratization. It is operated through structures and actions from different public, private and cooperative institutions and organizations. The whole of Portugal (mainland and autonomous regions) are included in the education system (Eurydice, 2019). The coordination of education policy relies on the Education Ministry from preschool to secondary and on the Ministry of Science, Technology and Higher education for post-secondary education. Education administration is composed by different services: Secretariat-General, Inspectorate-General of Education and Science, Directorate-General for Education, Directorate-General for High Education, Directorate-General for School Administration, Directorate-General for Education and Science Statistics, Institute for Financial Management of Education, Directorate-General for Schools (Eurydice, 2018). According to OECD studies, organization of instructions decisions are mainly taken at the school level, decisions regarding resources are more often at a school or local level and decisions about planning and structures or management are made at higher levels of authority (OECD, 2018b). Nevertheless, countries vary as it is seen in the annex 18.

Since the 1908's it has been a goal to place decision-making at lower levels of education systems (OECD, 2018b). It is the role of the Ministry to define guidelines and reinforce schools' autonomy (European Schoolnet, 2017). Despite the fact that Portugal is one of the countries of the OECD with the most centralized decision making processes in public lower secondary levels, the head teachers have now more flexibility to organize school activities and the duration of the lessons, while ensuring that the minimum time devoted to each subject is respected. The schools have autonomy to manage curriculum and choose which subjects to offer taking the overall curriculum structure into account (European Schoolnet, 2017). Every school has already the possibility to manage up to 25% of the total workload. The Education Ministry is now working on the possibility of schools managing more than 25% of the workload. This opportunity emerged with the extension of the curricular flexibility program to all

education institutions. It is a program that gives more autonomy to the schools and allows them to merge subjects or organize them in semesters instead of years, for instance (Viana, 2019).

The Ministry's decision on the workload management depends on the monitoring and assessment of the seven schools inserted in the Pilot Project of Pedagogical Innovation, currently underway (Viana, 2019). The Ministry issued a challenge to a group of schools to develop an innovating pedagogical project, breaking through most of the legal requirements and reorganizing everything (schedules, curricular basis, programs, classes, school calendar). With this pilot experience, formalized in *Despacho* 3721/2017, it is intended to assess the quality of learning and get familiar with factors that may ease or complicate the implementation of innovating educational practices in the future (DGE, 2019).

### **Economical Context**

Police makers' willingness to expand access to educational opportunities has increased the costs per student (OECD, 2018a) and in Portugal, the students' socio-economic background has a strong impact on their performance, on the probability of them dropping out or not participating in tertiary education (OECD, 2014). "Countries invest in educational institutions to help foster economic growth, enhance productivity, contribute to personal and social development, and reduce social inequality, among other reasons. The level of expenditure on educational institutions is affected by the size of the country's school age population, enrolment rates, levels of teachers' salaries, and the organization and delivery of instruction". The demographic composition of the country really affects the share of expenditure on education, making countries with low birth rates spend less than 1% of their wealth on primary and lower secondary education. OECD countries, in 2015, spend on average 5% of their gross domestic product (GDP) on educational institutions from primary to tertiary levels. Between primary and tertiary education, the annual expenditure per student is USD10 500 on OECD average. Expenditure, on average across OECD countries, is dominated by spending on core education services (teaching costs, for instance) (OECD, 2018a).

OECD countries are still witnessing effects from the economic crisis that began in 2008. There has been some adjustments of public budgets. The main source of educational funding is the government but with the increasing number of educational programs and providers, many governments are finding it difficult to provide the



necessary resources to address this demand through public funds only. Even though public funding still represents a big part of the educational investment, private funding is growing (11% increase between 2010 and 2015, on average in OECD countries). The largest share of private expenditure comes from households and goes to tuition fees, mostly. Government spending goes directly to educational institution but it can also transfer funds by subsidizing students, households and other entities through scholarships, grants or loans for tuition fees. Governments are using transfers from public to private to improve educational funding. This provides institutions the opportunity to organize their educational programs in consonance to what best meets students' requirements and increases access to education, while reducing social inequalities. The competition among institutions increases as well when funds are channeled through students' help and it can result in a greater efficiency in the education funding. (OECD, 2018a). In Portugal, the number of all educational institutions was 8469 in 2017/2018. The number of public schools and public and private schools has been decreasing since 2000, while the number of private schools hasn't varied as much (Annex 19). Nevertheless, the percentage of public education remains higher in institutions than private education, in all levels of compulsory schooling (Annex 20) (DGEEC, 2019).

### **Social Context**

Gender and socioeconomic background influences individual's participation in education and labor market. In more equal societies there is the tendency to have better education opportunities, which cultivates the conditions for economic growth (OECD, 2018b). Portugal has been dedicated to improve education in the country by establishing new policies to guide schools and teachers to deliver high quality education to students from all backgrounds and to reduce dropout rates. Portugal has been decreasing dropout rates since 2000 (OECD, 2014). Nevertheless, of all the OECD countries, Portugal continues to have one of the largest shares of adults without upper secondary education. Gender disparity is significant in secondary attainment rates too. The gap between genders is the largest of all OECD countries, 38% of 25-34 year-old men have not attained upper secondary education, compared to only 23% of women. Despite this fact, Portugal is above average in income inequality for women. Women earn less than men regardless of their level of educational attainment (OECD, 2018b).

To overcome this issue, Portugal has increased compulsory schooling to 18 years old, in 2009 (OECD, 2014). And, such as several other OECD countries, it has developed and promoted vocational education and training that provide more direct pathways to labor market. On the other hand, early childhood education (2, 3 and 4 year-olds) has increased in the past decade and the enrolment rates are above the OECD average. For the enrolment at the age of 6, which when compulsory education starts, the rate is at 97%. (OECD, 2018b). With the dropout rates decreasing, student's achievement has also improved. The transition or conclusion rate has increased in all school cycles since 2000, especially at the secondary level (Annex 21) (OECD, 2018a). Following that, unemployment rates are above the OECD average for all education levels (OECD, 2014) and the Minister of Work, Solidarity and Social Security, José António Vieira, states that the national minimum wage should continue to increase in order to achieve the goals of improving the well-being of citizens and decrease inequalities (Governo da República Portuguesa, 2019).

Portugal has been continuously to fight school dropout through the investment in policies and qualification of the citizens. Within the policies developed, there is "Programa Qualifica" that focused on adult training; the National Program of School Success Promotion, which bets on a local early intervention to correct the situations that have led to school abandonment; the reinforcement and valorization of professional courses; social action reinforcement by investing in the most vulnerable populations since dropping out of school is more frequent in socioeconomic disadvantaged students; school dropout territorial policies that promote collaboration between local and regional authorities and the government to manage available funds for the creation of school dropout programs (República Portuguesa, 2017).

### **Technological Context**

We live in a world that relies on digital technology more and more everyday and online platforms and electronic devices are the most common communication tools. The economy, productivity and competitiveness in all industry sectors rely on digital components, which leads to a need of digital literacy in almost every profession. Portugal is not far from the OECD average in terms of digital knowledge. However, it still needs to reinforce them. For that, it should invest in educating the young generation since childhood, moving to the qualification of the active population, to the specialization of graduate students so they can fill advanced digital positions and,

finally, to investigation and research. Portugal must be an active participant in the creation of new technologies. In line with the promotion of digital competences development, Portugal created the National Digital Competences National Initiative (INCoDe.2030) that is an integrated program of public policy (INCo.De, 2019).

In education, this initiative involves reviewing the contents and the teaching processes. Didactic and digital resources should be developed and teachers should receive training, not only once but also throughout life, so they can help students the best way. It is a must to include digital competences and resources in the learning process and guarantee that there are adequate technological infrastructures available to achieve that (INCo.De, 2019). According to DGEEC, the average number of students per computer with access to the internet had a huge decrease between 2001 and 2009 but it has been slightly increasing since then, as it is shown in annex 22 (DGEEC, 2019).

Other digital education initiatives were developed as a result of having the goal to improve digital competence, such as, system identity management and School management systems for greater transparency, allowing students, parents and community to make informed choices and be active participants. Information and Communication Technology (ICT) has also been a tool integrated across the entire curriculum. Projects like Portuguese eTwinning National Support Service (Connection between Competence Centers and local school to train teachers on ICT and help schools integrating ICT in the classroom), Webinars held by DGE (video-webinars for teachers on educational topics), Tell us a story! - Podcasts in Education (the use of the podcasts tools of video and audio for preschool and primary school level), and School Radio and TV Projects on the Web (support the implementation of radio and TV projects in school along with the share of good practice within the context) help bringing ICT to the schools. In addition to these projects, ICT is taught as an independent subject from 7th to 9th grade. It is a mainly practical subject that is organized in three areas - Information, Production, Communication and Collaboration - and the topic of digital safety is covered in all of them. Students learn to be users of a computer, network and the Internet and, in consonance with the ICT curricular goals, teachers should create learning moments where students can use their autonomy (European Schoolnet, 2017).

Since 2006, every Portuguese school, teaching students from the 5th to the 12th grade, has access to a Moodle learning platform. This free platform works as a communication channel for the school community and a workplace for both students

and teachers. National studied showed that over 98% of the participating schools use Moodle as a learning management system (LMS). Since every feature and information is in the same place, it is easier to support and cooperate within the entire school community. Through the use of Moodle, a distance learning project (Distance Education for Itinerant Students) emerged in 2007. The project initially supported children of seasonal workers because they are often travelling or change residence but it was expanded to include children who are at risk of dropping out of school, fail the academic year or are social excluded. In addition to this integration, Portugal, in 1999, was the first country in Europe and fourth in the world to approve legislation aiming to ensure that central government sites, including educational ones, were accessible to people with special needs. It was part of the National Initiative for Citizens with Disabilities (European Schoolnet, 2017).

#### **6.4 Porter's Five Forces**

Michael Porter created a tool to analyze the industry's attractiveness. He identified five forces that constitute the competitive environment, which may hurt our profitability. The five forces are competitive rivalry, supplier power, buyer power, threat of substitution and threat of new entrants.

##### **Competitive rivalry**

As the number of institutions in the industry is higher, the higher is the competition between them. The number of public schools is decreasing due to the schools' aggregation and private schools have been stable in the last few years. The existing rankings makes schools constantly battle to see which one is the best and which has the best students. Many factors can influence and determine customers' decisions on which educational institution to choose, such as tuition fees, admission and application processes, location, differentiation, educational offer and quality. The differentiation of the school is a determinant factor to stand out from the competition and, for now, there are still many schools that offer the same things and more students are looking for alternatives.

##### **Bargaining power of suppliers**

The main suppliers of the education industry are teachers, administrators, other school staff, software and technology, food services, infrastructure and school materials suppliers. The number of supplies is high since many different ones are needed. On the other hand, the quality of the suppliers' products and services is of huge importance

since they influence the quality of the educational experience. Not every teacher is capable of teaching in a school like Academia Geração and there are more that prefer a traditional approach rather than a constructivist one. But since it has been changing and the school offers a rewarding challenge, power and freedom for teachers that are not as common in other school, it can be very appealing for them and may encourage them to want to be a part of it.

### **Bargaining power of buyers**

The education industry has a high number of customers since every citizen has the right to it. With the compulsory schooling extending in 2009 and the decrease of dropout rates, the education industry has been getting more customers. Customers have several options to choose from and they are very demanding, so schools have to stand out. Within the options, the price varies and customers may be price sensitive. With the Portuguese economic situation, many customers are unwilling to attend private schools with high fees. Also, many customers tend to stay loyal to a certain institution throughout the entire educational experience and for the whole family as well. Customers' access to information determines their decisions. The Internet, especially social media, family and friends have a strong influence on that decision-making process.

### **Threat of substitute products**

The number of substitutes is considerably high since there are indmany different education providers, schools that only have the regular Portuguese academic program or international curriculums. Each educational institution may differ slightly on the product they offer. Yet, they all serve the purpose of increasing and improving learning and education, so they must find its own competitive strategy to be successful. Institutions offering a more diverse range of services with high quality and differentiation may demand higher prices.

### **Threat of new entrants**

The existing barriers to entry the industry determine the threat of new entrants. The necessary capital is very high due to the need to invest in infrastructure and equipment and there are some legal requirements for the school to be approved. The brand notoriety and differentiation are important factors to attract customers and fight competitors because people are saturated with information, so a good capacity to gain recognition is necessary.

A table in annex 23 demonstrates how each force contributes to the attractiveness of the market. It is possible to conclude that the industry is very competitive and hard to penetrate. Despite the barriers it may face, such as many substitutes, high costs of investment and legal barriers, the value that the school offers is of big importance, not only for customers, but for suppliers as well. Academia Geração’s differentiation offer can attract potential customers and stand out from the competition.

## **7. Internal Analysis**

### **7.1 SWOT analysis**

A SWOT analysis is always vital when developing a business idea. An internal analysis of the business will be developed to synthesize not only its strengths but also the weaknesses, so they can be later improved. An outlook of the market with the opportunities and threats it faces and that are important to take into consideration is also described.

<b>Strengths</b>	<b>Opportunities</b>
<ul style="list-style-type: none"> <li>- High quality education with the students at the center of it</li> <li>- Diverse offer for students</li> <li>- Constant monitoring of the students’ performances and needs</li> <li>- Valorization of the arts and sports for education</li> <li>- Connections with companies and organizations to provide different opportunities and experiences to the students</li> </ul>	<ul style="list-style-type: none"> <li>- Demanding society for innovation</li> <li>- Increasing demand for different courses</li> <li>- Effort to improve education by creating new policies</li> <li>- Awareness of the importance of the arts and sports for education</li> <li>- Increase will to support education from different companies and the government</li> </ul>
<b>Weaknesses</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>- Finding qualified teachers for the job</li> <li>- High school fees</li> <li>- Not having an existing school like this to base on</li> <li>- High initial investment</li> </ul>	<ul style="list-style-type: none"> <li>- Resistance from society to a different school</li> <li>- Difficulties in obtaining financing</li> <li>- Strict regulations and laws on educational contents and external assessment</li> <li>- High competition</li> </ul>

**Table 1 - SWOT analyzes**

#### **7.1.1 Qualified SWOT**

After the SWOT analysis, we can develop a qualified SWOT. By crossing strengths, weaknesses, opportunities and threats, we can describe the main challenges, warnings, constraints and risks we must consider for the business.

	<b>Opportunities</b>	<b>Threats</b>
<b>Strengths</b>	<p style="text-align: center;"><b>CHALLENGES</b></p> <p><b>S1 vs. O3</b> Provide a high quality education focusing on students according to the policies developed</p> <p><b>S2 vs. O1</b> Have an offer that addresses the demands of society for innovation</p> <p><b>S2 vs. O2</b> Offer a variety of activities and courses to respond to the students needs and be able to keep up with the changes that occur</p> <p><b>S4 vs. O4</b> Invest in the arts and sports in the school curriculum</p> <p><b>S5 vs. O5</b> Build partnerships with companies and organizations that have good opportunities for the students, specially in the arts and sports</p>	<p style="text-align: center;"><b>WARNINGS</b></p> <p><b>S4 vs. T1</b> The school should have a strong communication strategy to ensure society is aware of the benefit from valuing the arts and sports in education</p> <p><b>S2 vs. T4</b> Need to maintain a diverse offer in order to stand out from the competition</p> <p><b>S4 vs. T3</b> Need to organize the curriculum well in order to value the arts and sports while all academic contents are taught and students are prepared for national exams</p>
<b>Weaknesses</b>	<p style="text-align: center;"><b>CONSTRAINTS</b></p> <p><b>W1 vs. O2</b> the difficulty in finding the best teachers for the school may lead to a weak offer in different courses</p> <p><b>W2 vs. O2</b> Even though students are looking more for different course, the school fees may not be accessible to everyone that wishes to attend a school with characteristics that are costly</p> <p><b>W4 vs. O5</b> Despite the increase will to support education, the initial investment required is still high</p>	<p style="text-align: center;"><b>RISKS</b></p> <p><b>W4 vs. T2</b> Not able to find financing to open the school</p> <p><b>W1 vs. T3</b> Not finding teachers that are able to respond to the school's requirements and the existing regulations and laws at the same time</p> <p><b>W2 vs. T4</b> Lack of ability to overcome competition due to the school's fees</p>

Table 2 - Qualified SWOT

## 7.2 Competitive advantage

Through and external and internal analysis, it is possible to conclude our potential and define our competitive advantage, which is how we stand out from the competition. To be into more detailed and cleared, the competitive advantage was divided into three dimensions, emotional, functional and economic. The emotional advantage is that students can feel comfortable to pursue whatever they wish and are encouraged to do so. They are challenged and have to work hard but they also enjoy their time in school because they are doing something they like. The functional dimension of it that it is convenient since students have everything in the same place, from the academics to different activities to volunteer projects. It has a flexible curriculum that can be adapted to each students and it offers a wide range of high quality activities and subjects, so students can choose the ones that go along with their interests. Being offered a specialized training in the arts or sports and a constant contact

with those realities, children learn about responsibility, commitment, time management and hard work, which is a string advantage as well. Finally, the economic dimension is providing the opportunity for students coming from disadvantaged families to attend a private school that best addresses their interests and that would not be able to so without support.

Emotional dimension

- Opportunities for students to be who they are
- Building character
- Promote integration and intercultural knowledge

Functional dimension

- Convenience - “all in one place”
- Curriculum flexibility
- Extraordinary wide range of activities and opportunities within the curriculum with high quality
- High quality specialized training in the arts and sports

Economic dimension

- Support for disadvantaged families

### 7.3 Objectives

To determine the direction they want to go in, companies set objectives. It helps them stay focused and it guides them to carry out its mission and achieve the vision. They are quantitative and qualitative results for the company to achieve and for Academia Geração they are the following:

<b>Quantitative objectives</b>	<b>Qualitative</b>
Achieving an internal graduation rate of 100%	Disseminate the image that arts and sports are not valuable aspects of education or valuable careers
Achieving an internal flunking rate below 5%	Being a recognized school for having high quality education and excellent opportunities for students
Being able to have up to 50% of the students coming from low-income families in 15 years	Promoting a student-centered education, ensuring children’s total success
Have 40 students per grade in the first year of the school	Invest in human resources with adequate training in order to provide quality education and help the school move forward
	Create partnerships that improves students’ experience and adds value to the school
	Generate a discussion about education in Portugal and encourage change
	Increase the number of students pursuing arts and sport courses



Create a work environment where teachers and school staff enjoy spending time in and that motivates them
Offer as many activities, subjects and project for students as possible

**Table 3 - Quantitative and Qualitative Objectives**

## **8. Strategy development**

### **8.1 Strategy definition**

When developing a brand, it is important to understand the relative position of the firm in the industry. Michael Porter’s generic strategy is a framework used by many businesses that helps them build a niche within an industry. A firm can stand out by two different types of competitive advantage, low cost or differentiation. Cost leadership is having competitive advantage by your product’s prices. A firm becomes the low cost producer within its industry. A differentiation strategy is when the differentiation from all the competitors is through a unique characteristic that buyers value, while the focus strategy is about addressing particularly well a particular target or niche. In the differentiation focus, a firm differentiates itself in selected segment in the industry.

In this specific business plan, the strategy used is the differentiation focus since the school offers a unique service, a more personalized and rich education for students, which is a much-valued characteristic to a narrow target. Although many students are pursuing more alternative paths to the traditional academics, the majority continues to do so. Thus, the target of the school is narrow. This differentiation is based on the competitive advantages previously mentioned. Furthermore, by creating value to the customers, it is possible to practice higher prices.

		Competitive advantage	
		Low Cost	Differentiation
Competitive	Broad	Cost leadership	Differentiation
	Narrow	Cost focus	<b>Differentiation focus</b>

**Table 4 - Michael Porter's generic strategy**

### **8.2 Mission, Vision, Core values**

“A brand is not the name of a product. It is the vision that drives the creation of products and services under that name. The vision, the key beliefs of the brand and its core values are called identity” (Kapferer, 2008). Presenting Academia Geração’s

mission, vision and core values is crucial because it is what guides the people in school towards the same direction. These are important to be in the minds of the entire school community.

Mission: We provide a high quality and rich education to students by offering them the chance to have an active role in building their curriculum and completing it with a variety of activities and different opportunities.

Vision: To be recognized as the best school for students and an example of approach to education followed by many other schools.

Core Values

- Quality - To provide a high quality education that best prepares students for real life, not only professionally but also personally
- Commitment - To be a committed school to its students and always committed to pursue ways to improve and grow.
- Diversity - To be a diverse school, not only in activities with a wide range, but also, in students, coming from all social, economic and cultural backgrounds.
- Confidence - To transmit confidence to students and parents on the school. They must know the school is working to provide the best education possible.
- Freedom - To be a space where students feel free to pursue what they wish and for teachers to freely find the approaches they best see fit for their students.

**8.3 Critical Success Factors**

The critical success factors are the variables required to guarantee a successful outcome of the business. Having them defined is important so the organization can focus on them to meet the mission and vision.

<b>Critical Success Factor</b>	<b>Description</b>
Strategic partnerships	Create partnerships with local sports' clubs and arts organizations to provide more opportunities for students in those fields
Quality	Provide a high quality education, rich in content, different subjects, facilities and good teachers
Innovation	Ensure the school is constantly investing in new activities and opportunities
Qualified teachers	Guarantee students are being educated by the best professionals and that belief in a less traditional approach to education
Communication	Invest in a strong communication strategy in order to attract potential customers and make sure they have all the information about a different school

**Table 5 - Critical Success Factors**

## 8.4 Partnerships

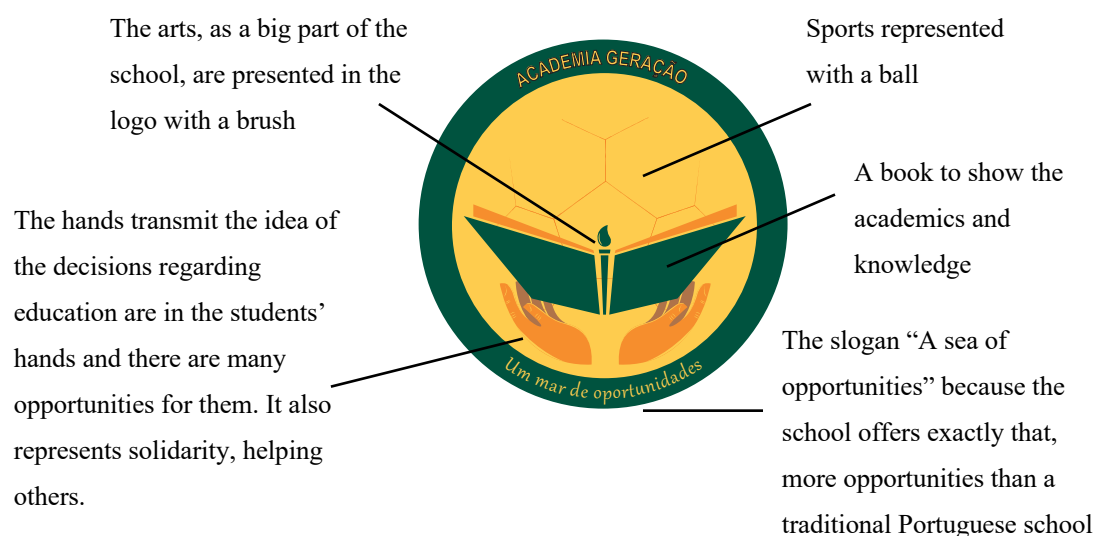
As it has been mentioned, it is intended to offer as many opportunities to the students as possible, and with high quality. So, investing in strategic partnerships is crucial to help Academia Geração to have that rich offer and to create value not only for students, but also the school. A list of strategic partnerships with a brief description of each is annex 24.

## 9. Implementation policies

### 9.1 The brand

A strong brand is key to have success. A brand's identity is what a brand transmit to the public, its values and the emotions you want your customers to feel when they are in contact with it. It symbolizes the differentiation of the competitors, so it is fundamental that it is well defined. The name chosen for the school was Academia Geração (Generation Academy). Academy because it is more than a school, it provides programs that go beyond the regular Portuguese academic curriculum. Generation since it generates or creates a school concept and approach to education that is always looking to improve, no matter the generation.

The colors chosen were orange, yellow and dark green. Orange because it symbolizes youth, creativity, adventurous and usually it is used to represent young and vibrant brands, rather than representing traditional brands. Yellow transmits optimism, happiness, friendliness, mental clarity and intellect. Finally, the dark green brings out the hope, freedom, growth and balance. Below, there is the logo designed to represent the brand with its symbolization.



**Figure 1 - Logo of Academia Geração and symbolization**

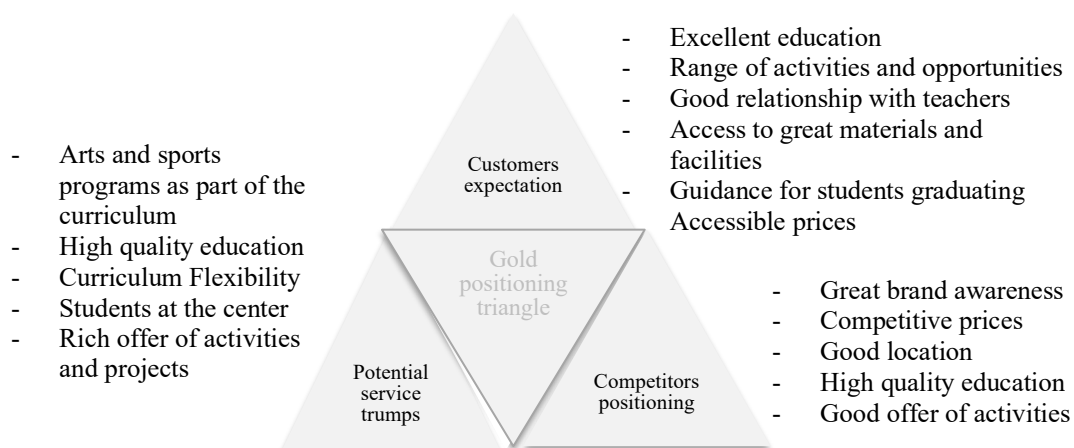
## 9.2 Segmentation, target and positioning

Academia Geração will open for grades 1<sup>st</sup> to 4<sup>th</sup> only, in the beginning, as explained before. Therefore, its target will be students from the age of 6 to 10. It will extend as the school opens one more grade every year. When it reaches the 12<sup>th</sup> grade, the target will be students from 6 to 18 years old.

We can segment the market to identify the customers according to a criteria, which is demographic, geographic, psychographic, behavioral criteria. Based on this criteria, three segments are defined.

- Students from the age of 6 to 10, both genders, mainly from medium/upper class
- Portuguese students, mainly from Lisbon;
- Students who are open-minded, wish to have a less traditional and more diverse education and value the arts and sports;
- Students from low-income families who want to study art or sports.

Market positioning is how the product is placed within the market and recognized by its customers. Its objective is to set the image or identity of the brand so customers perceive it in a certain way. Two aspects can define positioning, identification and differentiation. Academia Geração is a private school for students who want a rich education that values the arts and sports, trusts the students do have an active role in deciding their curriculum and offer a wide range of activities and opportunities. The differentiation of Academia Geração is: Arts and sports programs as part of the curriculum; Curriculum flexibility; Diverse and rich offer of activities and projects; Students at the center of every decision. To have a more complete understanding of the school's positioning, below, there is the gold positioning triangle.



**Figure 2 - Gold Positioning Triangle**

### **9.3 Marketing mix**

The Marketing mix is a marketing tool used in any business plan and a very important one since it combines different components to help us sell our product/service. Traditionally, there are 4P's but, since this project is a service, 7P's will be considered here. They are Product, Price, Placement, Promotion, People, Process and Physical Evidence.

#### **9.3.1 Product**

Academia Geração is a private school that provides a service, which is educating children. Within the educating market, this school offers a differentiated service in the sense that the regular Portuguese curriculum is complemented with art and sports programs and additional subjects and projects. The basic service is education, while the complementary services are arts program, sports program, optional subjects, innovative projects and guidance by a counselor. The school starts at 8a.m and it is open until 7p.m.

##### Characteristics/differentiation

Students are given the opportunity to decide their curriculum and the subjects they want to take. Having a national reference and some mandatory subjects, there is curriculum flexibility to better address students' needs and interests. Arts and sports integrated in education in a more general way in primary education and as the students grow, it gets more specific and demanding. In secondary education, there is no restriction to the courses of a selected course. Instead, students are free to take other subjects and continue training in the arts or sports.

#### **9.3.2 Price**

Defining a price of a product or service can be based on the average price of the competitors, company costs or demand. For this project, I will establish the price by taking the average price of competitors into account. However, Academia Geração aims to offer a differentiating service and an education with more activities included than other schools, so the price will be above average. The final price is the average price of the competitors, plus the reference price of extracurricular activities offered by competitors. Most schools choose to have a price for the regular curriculum and every extra activity is charged separately. In Academia Geração that does not happen since the activities it offers are mandatory and part of the curriculum, so the price established is

for everything. The only extra fees are for materials (lunch, t-shirt and sweatshirt of the uniform, school supplies like pens and notebooks and services from the stationary office). The bar, cafeteria and stationery shop are managed by external companies that pay rent to explore the business in school. It will be established a lunch menu and snacks that are around 7€ per student. Students who choose to have lunch from the school can pay it each day or monthly.

Since Academia Geração offers a differentiated service that is valued for customers, they will perceive that the money they are paying for the service is worth it. In addition to that, it is intended to build customer loyalty, so a 10% discount will be attributed to people who bring a friend or family member. In the table below all the prices are established.

	<b>Price</b>
Tuition fee for primary	510€
Tuition fee for 5 <sup>th</sup> to 6 <sup>th</sup> grade	540€
Tuition fee for 7 <sup>th</sup> to 9 <sup>th</sup> grade	570€
Tuition for secondary	600€
School lunch + morning and afternoon snack	7€ daily/ 140€ monthly
School uniform (t-shirt – two are mandatory)	15€
School uniform (sweatshirt)	20€
Enrolment fee (1 time - September)	250€

**Table 6 - Academia Geração prices**

### **9.3.3 Placement**

It is important to distribute and position the service in a place that is accessible for potential customers so, the choice of the place to have the school is a determinant factor to have access to customers. The school is to be created in Portugal since the goal is to improve the educational offer in the country. Within Portugal, there are many cities but only Oporto and Lisbon were considered since the two are the biggest and with more population. Since it is a big investment, not only moneywise, but also emotionally and in innovation, it should be first implemented in a big city that offers many resources to incorporate changes. Between the two cities, Lisbon was the chosen one even though rent prices are higher than Oporto. In Lisbon the reference price is €4,00/m<sup>2</sup>/month and in Oporto the price is between €3,00/m<sup>2</sup>/month and €3,50/m<sup>2</sup>/month (aicep Portugal Global, 2019). Lisbon was the city chosen because, as the capital of the country, it offers more resources that are important to the school and the author is more familiar with this city than Oporto. The transportation services are good in Lisbon and are increasing with the expansion of the metro to different parts of the city, which values it

even more. The school building must be ample and offer the required conditions to receive students. There must be space for classroom, sports field outside and room for children to play. It is intended to find a land in Lisbon with about 1200-1400 m<sup>2</sup> (having good practices of a private school in Lisbon as reference).

#### **9.3.4 Promotion**

It is through communication that you expose your service to the world, by sharing its characteristics and the advantage of using it. Promoting your service is what will attract customers. This means that having a strong communication strategy is crucial. Since Academia Geração starts from the 1st grade and students at that age do not have the power to decide where to go to school, parents are the ones deciding where to send their kids to school, so they become the main target for communication. Most people are familiar, feel more comfortable and believe in a more traditional school that focuses mainly on academics. This creates a challenge for us to attract customers since the school has a less traditional concept. A strong communication is even more important in this situation. People must be aware of the advantages a school like this can bring and the extended offer it has to enrich children's education.

##### Communication message

In addition to promoting the quality of the education, an emotional side will be appealed. The idea is to appeal to the audience's hearts and transmit the feeling that Academia Geração is a place where students can be whoever they want to be and where they feel comfortable and supported. The audience must know that the school places the student in the center and is always looking for ways to better help them. Moreover, it is intended to transmit convenience as well and show the audience that the school makes family life easier since students have everything they need in one place.

##### Communication Goals

- To show the quality of education
- To publicize the advantages of the arts and sports as learning tools and potential careers
- To retain customers and attract new ones
- To encourage people to pursue different careers and follow their wishes
- To create brand awareness
- To encourage more schools to adjust their curriculum and the government to change how the education system is structured and organized

### Communication channels

Creation of an appealing and intuitive website with all the information: Website with a creative design and the information into detail displayed in a clear, organized and direct way. Visitors can view the educational project, the programs, subjects and projects available in the school, the different areas and spaces the school has, the faculty and staff, the tuition fees, schedules, a calendar with important dates and events happening and news about the school, students and events that happened. The website also has a page for parents and students to get in contact with the school.

- Creating accounts on social media: With the strong presence of social media in the world, an account on Facebook and Instagram will be created to share news and curiosities about the school regularly.
- Billboards: Have billboards with teasers of the school in strategic places like areas with a lot of traffic, to leave people wondering.
- Flyers: Have flyers with brief explanation of the school, contacts and website for people to visit.
- Advertising on journals: Use of digital magazine NiT because it has gained relevance and it shares the latest news about lifestyle, culture and consumption. Advertising in Journals like *Público* or *Observador* as well since they are well-known journals by a wide audience.
- News report: Have a news report on national television to present the school and its project. More people will be reached and be aware of a new school that has a different educational offer that may fit their children.
- Radio: Have an interview with the project manager in a morning broadcast so people when they are dropping off their children or going to work, can here about Academia Geração and its new educational project.
- Events and experience: A free event to celebrate the inauguration is a change to explain the concept of the school and show the facilities. In addition, an open day will be implemented every year for interested people to get to know the school and ask all the doubts they have.
- Word-of-mouth: after the initial communication to make the school known, the investment will decrease and the mouth of customers will spread the message. As customers realize the quality of the school, they will transmit that to their friends, families and people they know. It is a strong communication strategy



because people trust the experiences they hear. So, it is important to build a good relationship with the customer and they become real sellers of the school.

### **9.3.5 People**

Any service relies 100% on people because it is through them that the customers perceive the quality of the service and the whole experience. For the service to be well perceived, it must be well executed. Teachers are determinant factors for the quality of the education provided, as well as the entire school staff. Faculty and staff are the people children spend the biggest part of their day with so it is important they are nice, supportive and encouraging. Teachers must receive training so they are prepared to teach in a school with different characteristics and to be able to incorporate arts and sports in academic subjects so everything is connected. They should learn how to teach by making connections between the content and students' real life context. Also, especially in the beginning of the school, collaboration is essential to guarantee a good performance in a school that is implementing a less traditional approach to education with many variables. Every faculty and staff member should be able to work in a team to find the best ways to help students.

### **9.3.6 Process**

Processes have to do with the procedures, instruments and systems customers have to go through to experience the service. Regarding Academia Geração, the processes are:

- Arriving at the school - being welcomed by a receptionist that greets them and wishes them a good day. This is the first contact with the school, the first experience with the service. Having a person at the entrance of the school, not only shows the school cares about their students and their well being, but also it is a way of controlling the entrance and exit of students. They can only get out if there is a known adult coming to pick them up or if there is permission from the parents or guardian.
- Classes and activities - The classes and activities the school offers are the main process of the service. It is in class that students learn the most and experience the service of education. A well conducted and with interesting content class or activity makes the experience of the customer a good one.
- Events - Through the implementation of events for students such as presentations and exhibitions, ceremonies or commemorative events are

processes that customers go through as well and it enriches the service experience.

The service starts when students enter the school in the first grade and it only ends when they graduate.

### **9.3.7 Physical Evidence**

Physical evidence also influences the idea the customers create around the service. In this case, the physical evidence are very important because students want to attend a school that is nice, comfortable, it has high quality equipment and the maximum commodities possible. The whole school will have free Wi-Fi so teachers and students can use it to work, a stationary office for school supplies, copying and printing, a cafeteria, a bar, a doctor's office, a library and an administration office.

The school will have uniforms so every student is equal and there is no economic differences highlighted. Students will have to wear jeans (any jeans they want as long as they are not ripped), any sneakers, a t-shirt and a sweatshirt with the school logo. Teachers do not have a uniform but are advised to wear clothes appropriate for a job with children - no mini skirts, flip flops, shirts with big cleavage or clothes with inappropriate messages written. Students pay attention to every detail so, it is important that the entire school facilities, faculty and staff transmit a good image.

### **9.4 Management and organization**

Working as a team is always more productive and when it comes to implementing a different concept or innovating in education, it is essential that everyone is on the same page, working towards the same goal. All school members, each with its role, are considered equally important since without all of them, the school wouldn't function properly. That is one of the ground aspects to value when it comes to managing the school and everyone must be aware of that. Communication between every school member, faculty or staff, is encouraged. In addition, especially in a school with different characteristics, qualified professionals are key. Everyone must receive training on how to interrelate contents from different subjects and real life and teachers must have specific training for the subjects they are teaching. A PE teacher shouldn't be in charge of dance training, for instance. In the annex 25 there is the organizational chart and in annex 26, the main tasks of each position. We can verify there are three hierarchy levels and they all connect with each other. The pedagogic managers are teachers and they

work together to best address students' needs. They collect the information gathered in monthly meetings, where the teachers from different departments and counselors participate in, and implement the teaching strategies and new projects.

Teachers must have a certain profile. They should be demanding not only with students but with themselves as well, open-minded, always looking for ways to improve students' performance, versatile, tolerant and communicative. It is also good to have a mixture of young and older teachers so they can complement each other.

### **9.5 Implementing requisites**

Each Regional Direction of Education grants the authorization for the opening of a cooperative and private teaching establishment. It can be granted to a singular or collective person. To obtain licensing for the creation of a private school, the singular or someone of the collective person must have an academic degree not inferior to the highest level offered by the school, the school must be installed and have enough and adequate equipment to achieve the proposed objectives, and commit to hiring the teaching staff with the qualification required by law. Moreover, to facilitate the authorization request, a series of documents must be delivered until February 28th of each year to start in the next school year. The required documents are the following (Secretaria Geral da Educação e Ciência, n.d).

For the holder identity (in case of society, its representative):

- Application form addressed to the Regional Director of Education;
- Certified statement of civil reputation or criminal record
- Certified statement of academic qualifications
- Certified statement of physical and mental sanity
- Declaration that she/she does not execute teaching function in a public school
- Certificate of society's constitution (in case of collective person)

For the pedagogical director: all the above, plus a certified statement to possess at least two years of pedagogy experience

For the facilities:

- Blueprints of the facilities where the teaching establishment, in a scale 1/1000
- Descriptive and justified memoir, signed by the responsible technician
- Map of the areas with indications of the natural lighting volume and surfaces
- Responsibility declaration from the responsible technician
- Municipality licensing for the intended purpose

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- Declaration from the National Fire Brigade as required in the 10th item of the Safety Regulation against fires in school buildings
- Lease contract or property ownership title or yielding of facilities
- Copy of the record from the tenants meeting that authorized the establishment to operate (in case the school is in a building of condominium regime)

Pedagogical documents

- Internal regulation
- Educational project

In addition to these required documents, it is important to be aware of all the activities necessary to proceed to the project's implementation. The biggest milestones are finding the ideal location and acquiring the financial investment needed. Below, all the main tasks and respective duration time for each is presented.

TASK	START	END	% DONE
<b>Phase 1 - Research</b>			
Idea development	Set. 2018	Nov. 2018	100%
Education today, methods and theories, arts and posrts education	Nov. 2018	Jan. 2019	100%
Market research - education offer in Portugal	Nov. 2018	Mar. 2019	100%
Portuguese education system structure	Dec. 2019	Feb. 2019	100%
<b>Phase 2 - Concept</b>			
Concept definition	Dec. 2019	Mar. 2019	100%
Curriculum structure and program	Feb. 2019	Apr. 2019	100%
Strategy definition	Feb. 2019	May. 2019	100%
Market and Internal analysis	Apr. 2019	Jun. 2019	100%
Marketing strategy developement	Jun. 2019	Aug. 2019	100%
Financial evaluation - feasibility analysis	Aug. 2019	Oct. 2019	100%
<b>Phase 3 - Implementation</b>			
Investment decision	Jan. 2020	Feb. 2020	0%
Looking for the best location	Feb. 2019	Sep. 2020	0%
Selecting a pedagogical director for the project	Feb. 2020	Apr. 2020	0%
Brand registration	Mar. 2020	Mar. 2020	0%
Obtaining financing	May. 2020	Aug. 2020	0%
Location decision - land acquisition	Sep. 2020	Oct. 2020	0%
Architectural project - design of the facilities followed by its approval from the Municipality of Lisbon	Oct. 2020	Jan. 2021	0%
Hiring building contractor and start the constructions	Jan. 2021	Nov. 2021	0%
Acquire and organize all required documents	May. 2021	Feb. 2021	0%

Deliever required documents to Regional Direction of Education by February 28th and get approval	Feb. 2022	Feb. 2022	0%
Students and staff's schedules definition	Mar. 2022	Mar. 2022	0%
Selection and negotiation with suppliers	Apr. 2022	May. 2022	0%
Communication and promotion of Academia Geração	Oct. 2022	Sep. 2023	0%
Hiring school faculty and staff	Jan. 2023	Mar. 2023	0%
Acquisition and installation of equipment	Mar. 2023	May. 2023	0%
Negotiation and reaching agreement with partning companies	Mar. 2023	May. 2023	0%
Opening of Academia Geração	Sep. 2022		0%

**Table 7 – Task chart**

### 9.6 Communication strategy

The communication is very important because it is a new concept, created from its roots. Therefore, it will be divided in two stages: awareness (communication to attract customer because he/she is still unaware of the service) and post-purchase (communication after customer is conquered). There will be some spontaneous actions but throughout the whole time, social media will be a constant to ensure the school remains in people's minds.

<b>Awareness</b>		
<b>Action</b>	<b>Timeline</b>	<b>Explanation</b>
<b>Social media and billboards</b>	October of the previous school year of opening	Little teasers to draw attention and make people wonder about a new teaching approach.
<b>Site, Social Media, Radio and flyers</b>	November/December of the previous school year of opening	Full explanation of the school to make the educational project known. Emphasize the arts and sports side of the school. Flyers distributed in the mail. Interview to the project manager to explain first hand and promote proximity and empathy. (For radio)
<b>National television and Newspaper</b>	January/February of the previous school year of opening	News report showing the school and some staff to have a more direct contact with it and gain trust.
<b>Academia Geração</b>	March of the previous school year of opening	Guided tours to show everything around and give them an idea of the actual experience. Opportunity for potential customers to make questions and for the school to conquer them.
<b>Social Media, NiT and national television</b>	Two weeks before registration begins	Strong presence on social media to captivate people and keep remanding them about the school opening. News on digital magazine NiT and second transmission of the news report on TV.

**Table 8 - Action of awareness stage**

<b>Post-purchase</b>		
<b>Action</b>	<b>Timeline</b>	<b>Explanation</b>
<b>Social media</b>	1 <sup>st</sup> day of school	Demonstrate the first day at school and the new students. Leave people intrigued and interested to know more of how it is going.
<b>Newspapers</b>	1 month after opening	Communicate the school opening and its good start.
<b>Social media, site</b>		Constant communication of events, activities and successes of the school. It is important to be transparent and show everything about the school.
<b>Open days</b>	1 each trimester	Invite the public to get to know the school and the work done there. People sign up on the website and spend one afternoon there to witness that environment of learning.

**Table 9 - Actions of the Post-purchase stage**

## **10. Financial Evaluation**

In this chapter, there will be a study on the economic and financial viability of the investment. The assumptions for analysis, the sales forecast, how to finance the investments, the financial statements and project evaluation will be presented into detail.

### **10.1 Main assumptions**

- Each grade will have maximum of 40 students, divided into two classes. Each grade also has 10% of students coming from low-income families that rely on private companies to sponsor their attendance in the school.
- The mandatory uniform is one sweatshirt and two t-shirts and it is intended to have at least a 10% margin.
- The prices of the tuition fees were established according to the competitors' price. It was defined above average since the idea is to offer all the activities included in the fee and not as an extra.
- The space rental prices were established according to two groups of schools in Lisbon that rent their spaces (Agrupamento de Escolas Vergílio Ferreira, 2019; Agrupamento de Escolas Eça de Queiroz, 2019). 45 hours a week are available to rent the spaces and it was assumed that a year has 52 weeks but since August is vacation for most people, only 48 weeks were considered. For each space it was considered an occupation rate since they may not be in use every hour, may not be available due to school activities or holidays and the request varied from space to space. Gyms and outside sports fields are very requested in Lisbon so a 90% occupation was considered, the theater is more expensive and less requested so it was assumed a 60% occupation rate and for the dance rooms as

well. The classrooms are the least requested but there are many available so it was considered to be occupied 50% of the time.

- The number of teachers was defined according to the characteristics of each cycle and the subjects. In the 1<sup>st</sup> cycle, the same teacher teaches the main subjects (Portuguese, Mathematics, Science) and specialized teachers teach the rest. From the 5<sup>th</sup> grade, teachers are specific for each subject. For the basic curriculum (main subjects like Portuguese and Math, for instance) and the common subjects that are the ones that are present in most grades and taught by the same teachers. All of these are contracted teachers with full schedule and a monthly salary. For the optional classes and the special courses of dance, gymnastics and volleyball, they are paid by the hour as it happens in many private schools. The school faculty is composed by a mixture of teachers with different characteristics and in different levels, so the salary isn't the same for everyone as it is seen in Paredes, M. & Pinto, M., 2019. Nevertheless, for financial evaluation purposes, an average of the different levels was taken into consideration for contracted teachers. For the hourly paid teachers, a private school in Lisbon was considered an example (50€/hour).
- The rest of the school staff salaries were defined according to Portuguese references and good practices of a private school in Lisbon.
- The Corporate Tax is 22,5% according to Deloitte, 2019.
- The Real Estate Tax in Lisbon is 0,3%. (Economias, 2019)
- As the area considered for the school facilities was between 1 200 and 1 400 m<sup>2</sup>, a price for a land of that size in Lisbon was researched on idealista' website. The defined price for the land was 1 500 000€. (The price may vary a lot depending on the neighborhood so this one is only a reference.)
- The average construction cost per m<sup>2</sup> in 2019 was 492,00€ according to Guerreiro, 2019.
- The IT equipment investment was based on the technology expenditure per student each year in the USA, in 2012, which was 360€ on average (Johnson, 2012).

## **10.2 Cash Flow**

The main sources of revenue are the tuition and enrolment fees from the students. As it is possible to observe in annex 27 these fees come from students and

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corporate grants. The low-income students represent 10% of the school population and the tuition and enrolment fees are covered by corporate grants and the school offers the uniform, while the medium/high income students are responsible for all of these expenses. Other sources of revenue are the rents from the cafeteria/bar and stationery shop because they are services explored by external companies, the space rentals and the school camps. The sales vary according to the number of students, which increases throughout the years with the introduction of one more grade each year. On the 9<sup>th</sup> year, the school has every grade, from 1<sup>st</sup> to 12<sup>th</sup>, opened.

In relation to the costs associated to the schools, they are the salaries and administrative costs (Annex 28). The teachers' salaries are the main piece of the costs and it may vary throughout the years due to the level of each teacher and the number of teachers. The number of teachers is also adjusted according to the number of students and with the opening of a grade every year. While the salaries increase over the years because when there are more students, more faculty and staff is needed, the administrative cost do not change as much and its weight tends to decrease with the increase of number of students. The administrative costs represent 15% of the revenues in year 1 and 6% in year 9. In the table below we can see the forecast of profit and loss until year 10 of the school.

Profit & Loss	0	1	2	3	4	5	6	7	8	9	10
<b>Turnover</b>	1 408 360,00	1 727 635,20	2 059 118,06	2 417 177,13	2 788 734,92	3 174 188,15	3 588 809,35	4 018 745,73	4 464 444,04	4 553 732,92	
Tuition Fees	807 840,00	1 042 113,60	1 285 435,01	1 550 679,58	1 826 019,76	2 111 753,27	2 421 564,53	2 742 923,53	3 076 168,27	3 137 691,64	
Enrolment Fee	36 000,00	45 900,00	56 181,60	66 856,10	77 935,12	89 430,55	101 354,62	113 719,88	126 539,21	129 070,00	
Corporate Grants	93 760,00	120 890,40	149 068,51	179 726,19	211 550,54	244 575,98	280 324,35	317 404,82	355 856,39	362 973,51	
Space rental	309 960,00	316 159,20	322 482,38	328 932,03	335 510,67	342 220,89	349 065,30	356 046,61	363 167,54	370 430,89	
School camps	144 000,00	183 600,00	224 726,40	267 424,42	311 740,46	357 722,18	405 418,47	454 879,52	506 156,85	516 279,99	
Uniforms	7 200,00	9 180,00	11 236,32	13 371,22	15 587,02	17 886,11	20 270,92	22 743,98	25 307,84	25 814,00	
<b>Operating Costs</b>	960 429,80	1 108 116,85	1 150 658,40	1 277 216,65	1 330 463,20	1 481 388,24	1 564 813,91	1 690 992,98	1 761 843,23	1 796 851,72	
Teachers	357 600,00	439 008,00	466 515,36	523 387,79	559 833,91	637 275,44	701 824,42	750 321,48	800 477,69	816 487,24	
Other Staff	387 000,00	446 760,00	455 695,20	518 930,71	529 309,33	596 203,63	608 127,71	678 873,23	692 450,69	706 299,71	
Administrative Costs	215 829,80	222 348,85	228 447,84	234 898,15	241 319,96	247 909,16	254 861,78	261 798,27	268 914,85	274 064,77	
<b>EBITDA</b>	447 930,20	619 518,35	908 459,66	1 139 960,48	1 458 271,72	1 692 799,91	2 023 995,44	2 327 752,75	2 702 600,80	2 756 881,20	
	31,8%	35,9%	44,1%	47,2%	52,3%	53,3%	56,4%	57,9%	60,5%	60,5%	
Depreciations & Amortizations	0	102 460,00	133 936,00	133 936,00	115 628,00	98 348,00	85 348,00	82 280,00	82 280,00	79 680,00	73 920,00
<b>EBIT</b>	345 470,20	485 582,35	774 523,66	1 024 332,48	1 359 923,72	1 607 451,91	1 941 715,44	2 245 472,75	2 622 920,80	2 682 961,20	
	24,5%	28,1%	37,6%	42,4%	48,8%	50,6%	54,1%	55,9%	58,8%	58,9%	
Financial costs	0	0	0	0	0	0	0	0	0	0	0
<b>EBT</b>	345 470,20	485 582,35	774 523,66	1 024 332,48	1 359 923,72	1 607 451,91	1 941 715,44	2 245 472,75	2 622 920,80	2 682 961,20	
	24,5%	28,1%	37,6%	42,4%	48,8%	50,6%	54,1%	55,9%	58,8%	58,9%	
Corporate Tax	22,50%	77 730,80	109 256,03	174 267,82	230 474,81	305 982,84	361 676,68	436 885,98	505 231,37	590 157,18	603 666,27
<b>Net Profit</b>	267 739,41	376 326,32	600 255,84	793 857,67	1 053 940,89	1 245 775,23	1 504 829,47	1 740 241,38	2 032 763,62	2 079 294,93	
	19,0%	21,8%	29,2%	32,8%	37,8%	39,2%	41,9%	43,3%	45,5%	45,7%	

**Table 10 - Profit and Loss**



### 10.3 Investment

Academia Geração requires a high investment of 1 985 283,60€. This investment is regarding the purchase of a land to build the school in, the construction of the school, its fit out, IT equipment and initial marketing and communication. Due to the fact that the school only opens with four grades in the beginning and it gradually opens the rest, some of the investment can be phased out. It was defined that only 50% is invested in year 0 and the rest is developed the year before of a new school cycle is opened, so before the grade 5<sup>th</sup>, 7<sup>th</sup> and 10<sup>th</sup> are introduced. In year 1, 30% more is invested and developed, in year 4, 10% more and in year 6, the last 10%. We can see the investment in the table below and into more detail in annex 29.

Year	0	1	2	3	4	5	6	7	8	9	10
<b>CAPEX</b>	<b>1 985 283,60</b>	<b>282 720,00</b>	<b>0,00</b>	<b>94 240,00</b>	<b>0,00</b>	<b>0,00</b>	<b>94 240,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>
Property	1 500 000,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Construction & Fit Out	384 800,00	230 880,00	0,00	76 960,00	0,00	0,00	76 960,00	0,00	0,00	0,00	0,00
IT Equipment	172 800,00	86 400,00	51 840,00	0,00	17 280,00	0,00	0,00	17 280,00	0,00	0,00	0,00
Marketing & Communication	14 083,60										
Development phasing	0,50	0,30		0,10			0,10				
<b>Gross Fixed Assets</b>	<b>1 971 200,00</b>	<b>2 253 920,00</b>	<b>2 253 920,00</b>	<b>2 348 160,00</b>	<b>2 348 160,00</b>	<b>2 442 400,00</b>	<b>2 442 400,00</b>	<b>2 442 400,00</b>	<b>2 442 400,00</b>	<b>2 442 400,00</b>	<b>2 442 400,00</b>
Property	1 500 000,00	1 500 000,00	1 500 000,00	1 500 000,00	1 500 000,00	1 500 000,00	1 500 000,00	1 500 000,00	1 500 000,00	1 500 000,00	1 500 000,00
Construction	319 800,00	511 680,00	511 680,00	575 640,00	575 640,00	575 640,00	639 600,00	639 600,00	639 600,00	639 600,00	639 600,00
Furniture	65 000,00	104 000,00	104 000,00	117 000,00	117 000,00	117 000,00	130 000,00	130 000,00	130 000,00	130 000,00	130 000,00
IT Equipment	86 400,00	138 240,00	138 240,00	155 520,00	155 520,00	155 520,00	172 800,00	172 800,00	172 800,00	172 800,00	172 800,00
<b>Depreciations</b>	<b>0,00</b>	<b>102 460,00</b>	<b>133 936,00</b>	<b>133 936,00</b>	<b>115 628,00</b>	<b>98 348,00</b>	<b>85 348,00</b>	<b>82 280,00</b>	<b>82 280,00</b>	<b>79 680,00</b>	<b>73 920,00</b>
Asset life time											
Property	30	50 000,00	50 000,00	50 000,00	50 000,00	50 000,00	50 000,00	50 000,00	50 000,00	50 000,00	50 000,00
Construction	30	10 660,00	17 056,00	17 056,00	19 188,00	19 188,00	19 188,00	21 320,00	21 320,00	21 320,00	21 320,00
Furniture	5	13 000,00	20 800,00	20 800,00	23 400,00	23 400,00	10 400,00	5 200,00	5 200,00	2 600,00	2 600,00
IT Equipment	3	28 800,00	46 080,00	46 080,00	23 040,00	5 760,00	5 760,00	5 760,00	5 760,00	5 760,00	0,00
<b>Net Fixed Assets</b>	<b>1 811 140,00</b>	<b>1 954 164,00</b>	<b>1 866 308,00</b>	<b>1 850 680,00</b>	<b>1 758 092,00</b>	<b>1 678 504,00</b>	<b>1 678 944,00</b>	<b>1 602 424,00</b>	<b>1 528 504,00</b>	<b>1 454 584,00</b>	<b>1 380 664,00</b>

**Table 11 - CAPEX and Fixed Assets**

### 10.4 Financing

Two scenarios were considered to finance the project. One was with an investor investing 100% and one with an investor investing 45% and the other 55% are from a loan. The difference between the two is that with the loan, financial costs exist (annex 30). However, its internal rate of return is 39% for the investor, higher than when investing 100%, which is 28%. The loan scenario allows a bigger return because the invested capital (45% of the initial investment) is lower. The two scenarios are displayed below.

*Business Plan*  
*Implementation of a school from 1<sup>st</sup> to 12<sup>th</sup> grade with integrated arts and sports programs*

Year	0	1	2	3	4	5	6	7	8	9	10
Operating Cash Flow (Net Profit + Depreciations)	0,00	370199,41	510262,32	734191,84	909485,67	1152288,89	1331123,23	1587109,47	1822521,38	2112443,62	2153214,93
CAPEX	-1985283,60	-282720,00	0,00	-94240,00	0,00	0,00	-94240,00	0,00	0,00	0,00	0,00
Free Cash Flow BEFORE funding activities	-1985283,60	87479,41	510262,32	639951,84	909485,67	1152288,89	1236883,23	1587109,47	1822521,38	2112443,62	2153214,93
Equity	1985283,60										
Loan	0,00										
Debt Repayment	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Free Cash Flow AFTER funding activities	0,00	87479,41	510262,32	639951,84	909485,67	1152288,89	1236883,23	1587109,47	1822521,38	2112443,62	2153214,93

PROJECT											
Operating Cash Flow	0,00	370199,41	510262,32	734191,84	909485,67	1152288,89	1331123,23	1587109,47	1822521,38	2112443,62	2153214,93
CAPEX	-1985283,60	-282720,00	0,00	-94240,00	0,00	0,00	-94240,00	0,00	0,00	0,00	0,00
Debt Repayment	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Free Cash Flows of the PROJECT	-1985283,60	87479,41	510262,32	639951,84	909485,67	1152288,89	1236883,23	1587109,47	1822521,38	2112443,62	2153214,93
Cummulative	-1985283,60	-1897804,20	-1387541,87	-747590,04	161895,64	1314184,52	2551067,75	4138177,22	5960698,60	8073142,23	10226357,15
Discounted Free Cash Flows of the PROJECT	-1985283,60	79526,73	421704,40	480805,29	621190,95	715480,74	698188,34	814438,11	850219,67	895882,31	830157,57
Cummulative	-1985283,60	-1905756,87	-1484052,47	-1003247,18	-382056,23	333424,51	1031612,85	1846050,96	2696270,63	3592152,94	4422310,51

Weighted Average Cost of Capital (WACC)	10%
Net Present Value (NPV)	4 422 310,51
Internal Rate of Return (IRR)	35%

INVESTOR											
Equity	1985284	-1985283,60	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Residual Value	24010763,14										24010763,14
Enterprise Value	13784405,98										
EBITDA @ Year 10	2756881,20										
Multiplier	5										
Available Cash	10226357,15										
Debt	0										
Free Cash Flows for the INVESTOR	-1985283,60	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Cummulative	-1985283,60	-1985283,60	-1985283,60	-1985283,60	-1985283,60	-1985283,60	-1985283,60	-1985283,60	-1985283,60	-1985283,60	-1985283,60
Discounted Free Cash Flows for the INVESTOR	-1985283,60	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	9257188,60
Cummulative	-1985283,60	-1985283,60	-1985283,60	-1985283,60	-1985283,60	-1985283,60	-1985283,60	-1985283,60	-1985283,60	-1985283,60	7271905,00

Weighted Average Cost of Capital (WACC)	10%
Net Present Value (NPV)	7 271 905,00
Internal Rate of Return (IRR)	28%

**Table 12 - Scenario 1 with 100% investment from investor**

Year	0	1	2	3	4	5	6	7	8	9	10
Operating Cash Flow (Net Profit + Depreciations)	0,00	340581,46	481508,23	707165,46	884187,01	1128717,93	1309279,99	1566993,95	1804133,57	2095783,53	2138282,54
CAPEX	-1985283,60	-282720,00	0,00	-94240,00	0,00	0,00	-94240,00	0,00	0,00	0,00	0,00
Free Cash Flow BEFORE funding activities	-1985283,60	57861,46	481508,23	612925,46	884187,01	1128717,93	1215039,99	1566993,95	1804133,57	2095783,53	2138282,54
Equity	893377,62										
Loan	1091905,98										
Debt Repayment	0,00	0,00	-63694,52	-63694,52	-63694,52	-63694,52	-63694,52	-63694,52	-63694,52	-63694,52	-63694,52
Free Cash Flow AFTER funding activities	0,00	57861,46	417813,71	549230,94	820492,49	1065023,42	1151345,48	1503299,43	1740439,05	2032089,01	2074588,03

PROJECT											
Operating Cash Flow	0,00	340581,46	481508,23	707165,46	884187,01	1128717,93	1309279,99	1566993,95	1804133,57	2095783,53	2138282,54
CAPEX	-1985283,60	-282720,00	0,00	-94240,00	0,00	0,00	-94240,00	0,00	0,00	0,00	0,00
Debt Repayment	0,00	0,00	-63694,52	-63694,52	-63694,52	-63694,52	-63694,52	-63694,52	-63694,52	-63694,52	-63694,52
Free Cash Flows of the PROJECT	-1985283,60	57861,46	481508,23	612925,46	884187,01	1128717,93	1215039,99	1566993,95	1804133,57	2095783,53	2138282,54
Cummulative	-1985283,60	-1927422,14	-1445913,91	-832988,46	51198,55	1179916,48	2394956,48	3961950,42	5766083,99	7861867,52	10000150,06
Discounted Free Cash Flows of the PROJECT	-1985283,60	52601,32	397940,69	460499,97	603911,62	700845,03	685858,40	804115,66	841641,62	888816,80	824400,49
Cummulative	-1985283,60	-1932682,28	-1534741,59	-1074241,62	-470330,00	230515,03	916373,43	1720489,10	2562130,72	3450947,52	4275348,01

Weighted Average Cost of Capital (WACC)	10%
Net Present Value (NPV)	4 275 348,01
Internal Rate of Return (IRR)	34%

INVESTOR											
Equity	893378	-893377,62	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Residual Value	23265900,71										23265900,71
Enterprise Value	13784405,98										
EBITDA @ Year 10	2756881,20										
Multiplier	5										
Available Cash	10000150,06										
Debt	518655										
Free Cash Flows for the INVESTOR	-893377,62	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Cummulative	-893377,62	-893377,62	-893377,62	-893377,62	-893377,62	-893377,62	-893377,62	-893377,62	-893377,62	-893377,62	-893377,62
Discounted Free Cash Flows for the INVESTOR	-893377,62	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	8970111,89
Cummulative	-893377,62	-893377,62	-893377,62	-893377,62	-893377,62	-893377,62	-893377,62	-893377,62	-893377,62	-893377,62	8076634,27

Weighted Average Cost of Capital (WACC)	10%
Net Present Value (NPV)	8 076 634,27
Internal Rate of Return (IRR)	39%

**Table 13 - Scenario 2 with 45% investment and 55% loan**

## **11. The future**

The future of education is unpredictable and a challenge. Educators react to the “pushes and pulls from other sectors of society. Presidents, governors, or commissioners hold press conferences deploring low levels of student’s achievement, and schools scramble to react”. Educators develop programs to respond to the competition between schools, to the graduation requirements or tests. In 2000, Hoerr, predicted there was no denying that “continued technological advances will be the norm”, “racial, ethnic, and cultural diversity will increase” and “the free market, consumer-driven model will become more pervasive in many organizations, including schools” (Hoerr, 2000). This has been true and with the inevitability of change, we must be proactive and anticipate how it will affect us. Change is always happening and challenges are everywhere, it is how we respond to them that matters. We can turn a challenge into something positive. We must generate conversations that may lead to improvement and act on the issues we identify as damaging.

Education will continue to be a key issue for society and people will have different points of view on how to approach it. Despite the chosen approaches, it must address the demands of the world and students’ needs the best way possible.

## **12. Conclusion**

As we reach the end of the business plan, it is important to summarize it and reflect on it.

As it has been mentioned, education is very important in many levels. It reflects on people's behaviors as adults. Educators must develop active and responsible citizens and prepare them for today's demanding world. Because of its importance in people's lives, education should be of high quality and accessed by every child, which still does not happen everywhere in Portugal and in the world. Moreover, people are different, have different interests and characteristics, so schools must provide an education that is adjusted to the child. Not only Portuguese and Mathematics are important. Other skills are of much relevance for people to succeed, not only professionally, but also personally. Art and sports are two areas that help students develop many important competences. Students need to understand the value of arts and sports in their education and their lives from the beginning to take it with them after school. People's beliefs and mindsets are something very difficult to change but if these disciplines are more included in the curriculum from an early age, people start seeing the outcomes and gain appreciation for it. New generations may change the society's view on these disciplines that are still perceived as useless by many.

This project addresses a major need, which is diversity and alternative courses in the Portuguese education. It is a great first start to induce change and develop art and sports in Portugal. With more education in those, more people explore them and good professionals will want to stay in the country to develop those industries here rather than looking for opportunities abroad.

The competition is high because there are many schools in Lisbon and the concept may not be perceived as beneficial by everyone, so a good communication is fundamental to inform people of the benefits of a school with Academia Geração's characteristics. However, there is an increase in the demand for more diverse and less traditional courses, so many students will be interested.

Many challenges may surface in the project, such as finding adequate and qualified teachers or finding the best location for the school but the main challenge relies on finding funding for the investment since it is high. As a result of the financial analyzes, it is possible to conclude that the project is viable. It has a good profit margin, which allows Academia Geração to invest more in opportunities and excellent conditions for its students.

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## Annexes

(Note: Some figures and tables are in Portuguese because of its source but since it is relevant for the project, legends are available in those cases to allow its understanding.)

### Annex 1 – Phases of MI implementation according for Thomas R. Hoerr

PHASE	CHARACTERISTICS	TEACHER BEHAVIORS
1. Awareness	questioning the status quo and dissatisfaction with the “traditional approach” to education; a recognition that there must be a better way to educate students	identifying students who are bored or who are not challenged, allowing lessons to be text driven, eager to find new ways to reach kids
2. Exploration	reading and learning about MI, a nucleus of faculty members meeting regularly to pursue the idea of bringing MI to the school	thinking and talking about how faculty roles and instruction would change from using MI, consciously using a “new” intelligence
3. Courtship	visiting or communicating with schools using MI, generating interest among the rest of the faculty, initial attempts at informing parents and other stakeholders	experimenting with MI, trading ideas and strategies with others, focus on MI in staff development, seeing more students succeed
4. Full-Speed Ahead	most of the faculty begins to use MI, parents understand how MI helps their children, MI is used regularly, signs and graphics throughout the school extol its virtues	assessment and reporting practices begin to change, much enthusiasm as teachers work collaboratively in many different directions
5. Roadblocks	internal or external obstacles are encountered, there are questions about the merits of MI and how it can be used to help students	feelings of frustration or defensiveness can occur, possibility that faculty divides into pro- and anti-MI camps
6. Regrouping	reflection leads to a commitment to MI based on both the gains and costs associated with its use, a realization that using MI doesn't solve all problems	the pace slows, more focus on reflection and refinement of MI practices, a push toward understanding
7. An MI School; An MI Learning Community	MI affects all areas of the school: curriculum, instruction, assessment, relations among faculty and with parents; a recognition that the journey has as much value as the destination	engagement in all aspects of curriculum, pedagogy, and assessment, working as colleagues, a recognition that becoming an MI school will always be a work in progress

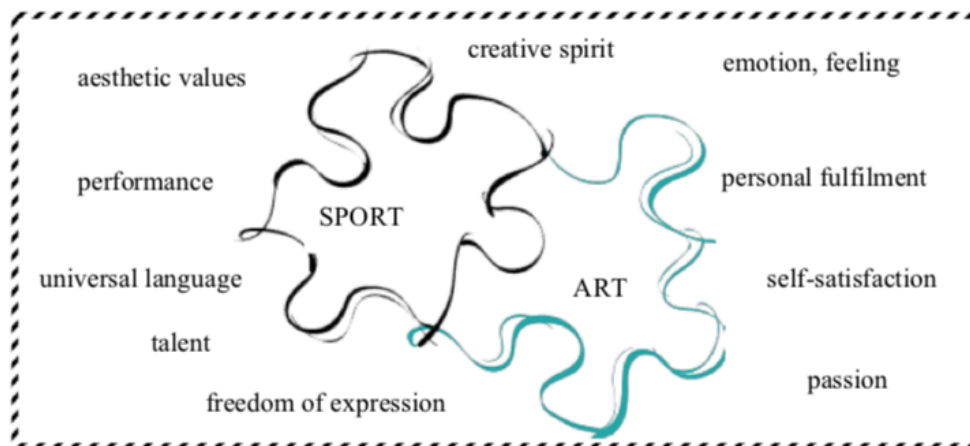
Source: Hoerr, 2000

## Annex 2 – IB Middle Years Programme



Source: IBO, 2014

## Annex 3 – Table of elements through which sport is at border with art



Source: Urzeala, 2018

#### **Annex 4 - Questionnaires**

##### **Questionnaire 1 – students of primary and secondary education**

1. Student. (Yes; No – If no, end of questionnaire)
2. School year currently attending. (12<sup>th</sup>; 11<sup>th</sup>; 10<sup>th</sup>; 9<sup>th</sup>; Other)
1. Course attending. (Science and Technology Course; Socioeconomic Sciences Course; Languages and Humanities Course; Visual Arts Course; Professional Course; Primary education; Other)
3. Do you have any extracurricular activities outside schools? (Yes; No)
  - a. If yes, which one/s? (Open question)
  - b. If no, why? (Open question)
4. Do you like art (Music, Theater, painting, dance...)? (Yes; No)
5. Do you have art classes in school? (Yes; No)
  - a. If yes, which one/s? (Open question)
  - b. If no, why? (There aren't art classes in my school; I am not interested; I don't have time; My friends don't attend those classes; It isn't part of my course; I have art classes outside school)
6. Do you like sports? (Yes; No)
7. Did you practice sports in school? (Yes; No)
  - a. If yes, which one/s? (Open question)
  - b. If no, why? (There aren't sports in my school; I am not interested; I don't have time; My friends don't attend those classes; It isn't part of my course; I practice sports outside school)
8. How often do you attend school activities (events, workshops, dances...)? (Always; Frequently; Sometimes; Rarely; Never; It isn't common to have activities in my school)
9. All subjects should be considered equally important. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)
10. The Portuguese education system is more focused on tests rather than on the student's learning. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)
11. The current assessment system is the most appropriate. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)

12. Would you like to, after choosing the secondary course, have the opportunity to attend subjects outside of the pre-defined curriculum? (Yes; No)
  - a. Select the ones that you would have like to have the most. (Dance; Theater; Drawing; Photography; Journalism; Law; Sports management; Musical instrument; First aid training; debate; Other languages; Sexual education; Cooking and sewing)
13. Would you change anything in your school experience? What and why? (Open question)

### **Questionnaire 2 – young adults/recent graduates from high school**

1. Did you graduate from high school? (Yes; No – If no, end of questionnaire)
2. Course attending in high school. (Science and Technology Course; Socioeconomic Sciences Course; Languages and Humanities Course; Visual Arts Course; Professional Course; Primary education; Other)
3. Current occupation. (University student; Employed; Working student; Unemployed)
4. Did you attend any extracurricular activities? (Yes; No)
  - a. If yes, which one/s? (Open question)
  - b. If no, why? (Open question)
5. Do you like art (Music, Theater, painting, dance...)? (Yes; No)
6. Did you have art classes in school? (Yes; No)
  - a. If yes, which one/s? (Open question)
  - b. If no, why? (There weren't art classes in my school; I wasn't interested; I didn't have time; My friends didn't attend those classes; It wasn't part of my course; I had art classes outside school)
7. Do you like sports? (Yes; No)
8. Did you practice sports in school? (Yes; No)
  - a. If yes, which one/s? (Open question)
  - b. If no, why? (There weren't sports in my school; I wasn't interested; I didn't have time; My friends didn't attend those classes; It wasn't part of my course; I practiced sports outside school)
9. How often did you attend school activities (events, workshops, dances...)? (Always; Frequently; Sometimes; Rarely; Never; It wasn't common to have activities in my school)



10. All subjects should be considered equally important. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)
11. The Portuguese education system was more focused on tests rather than on the student's learning. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)
12. The assessment system was the most appropriate. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)
13. Would you have liked to, after choosing the secondary course, have had the opportunity to attend subjects outside of the pre-defined curriculum? (Yes; No)
  - a. Select the ones that you would have like to have the most. (Dance; Theater; Drawing; Photography; Journalism; Law; Sports management; Musical instrument; First aid training; debate; Other languages; Sexual education; Cooking and sewing)
14. Would you have changed anything in your school experience? What and why? (Open question)

### **Questionnaires 3 – students' guardians**

1. School year of his/her oldest child (12<sup>th</sup>; 11<sup>th</sup>; 10; 9<sup>th</sup>; 8<sup>th</sup>; 7<sup>th</sup>; other; already finished high school)
2. Oldest child's course. (Science and Technology Course; Socioeconomic Sciences Course; Languages and Humanities Course; Visual Arts Course; Professional Course; Primary education; Other)
3. Every student's needs are addressed in the current Portuguese education system. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)
4. All subjects should be considered equally important. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)
5. The Portuguese education system is more focused on tests rather than on the student's learning. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)
6. It is important for students to have time after school. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)
7. Does your child attends/ attended any extracurricular activities? (Yes; No)
  - a. If yes, which one/s? (Open question)

- b. If no, why? (Guardian's lack of time; Child' lack of time; Child' lack of interest; Don't consider it important; There isn't/wasn't any available activities; Other)
8. Do you consider the arts and sports important for education?
    - a. Why? (Open question)
  9. A school that offers arts and sports programs benefits the students. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)
  10. It is important for students, after choosing their secondary course, to have the opportunity to attend subjects outside their pre-defined curriculum. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)
  11. What do you consider most important for you child's education?

#### **Questionnaire 4 – teachers of basic and secondary education**

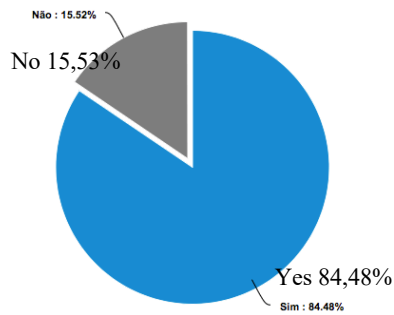
1. Which cycle do you teach? (Preschool; 1<sup>st</sup> cycle; 2<sup>nd</sup> cycle; 3<sup>rd</sup> cycle; Secondary; Professional courses)
2. Which subject/s do you teach? (Open question)
3. How often do you collaborate with teachers from other subjects to plan classes? (Always; Frequently; Sometimes; Rarely; Never)
4. Every student's needs are addressed in the current Portuguese education system. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)
5. All subjects should be considered equally important. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)
6. The Portuguese education system is more focused on tests rather than on the student's learning. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)
7. The current assessment system is the most appropriate. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)
8. It is important for students to have time after school. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)
9. Do you consider the arts and sports important for education? (Yes; No)
  - a. Why? (Open question)
10. A school that offers arts and sports programs benefits the students. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)

11. It is important for students to have a diverse offer of subjects since the 1<sup>st</sup> cycle.  
(Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)
12. It is important for students, after choosing their secondary course, to have the opportunity to attend subjects outside their pre-defined curriculum. (Strongly agree; Agree; Not agree or disagree; Disagree; Strongly disagree)
13. If you could change anything in the education system, what would be the first one?

Source: Author

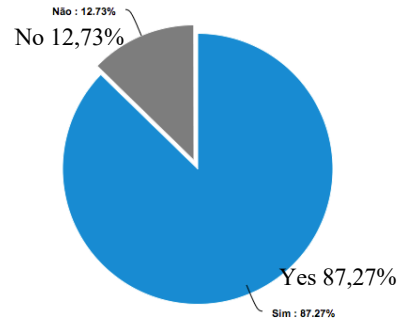
### Annex 5 – Answers to the questionnaire 1

**3. Do you attend any extracurricular activities outside school?**



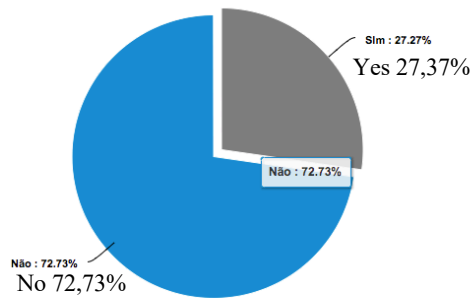
Source: Author

**4. Do you like art?**



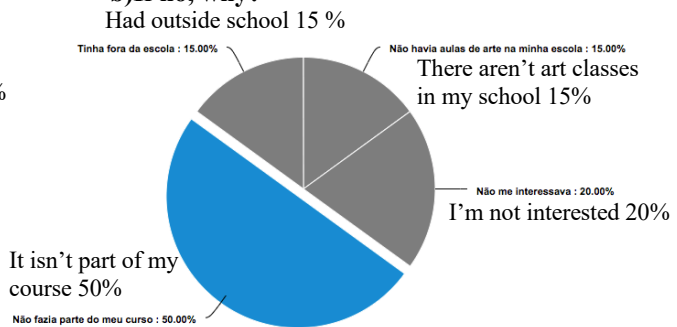
Source: Author

**5. Do you have art classes in school?**



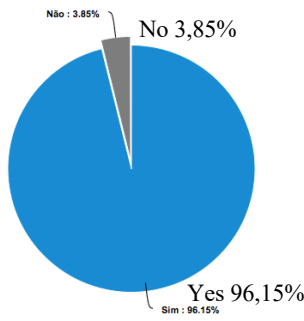
Source: Author

**b) If no, why?**



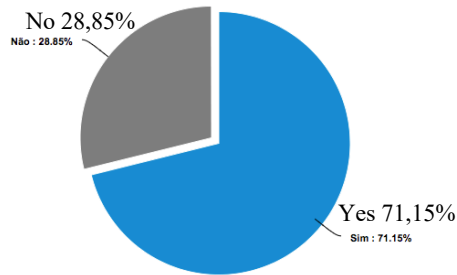
Source: Author

**6. Do you like sports?**



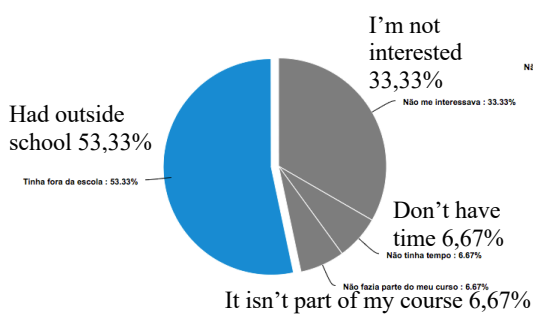
Source: Author

**7. Do practice sports at school?**



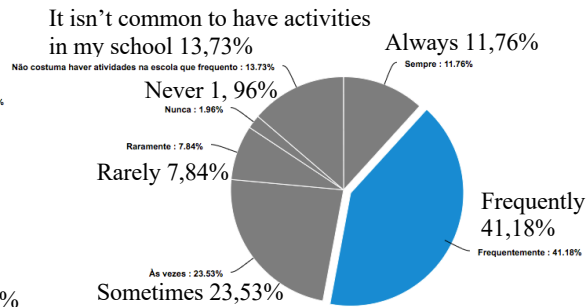
Source: Author

**b)If no, why?**



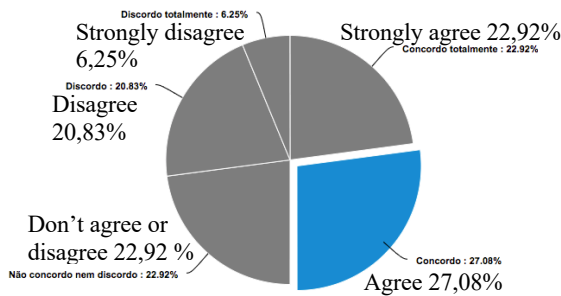
Source: Author

**8. How often do you attend activities in school?**



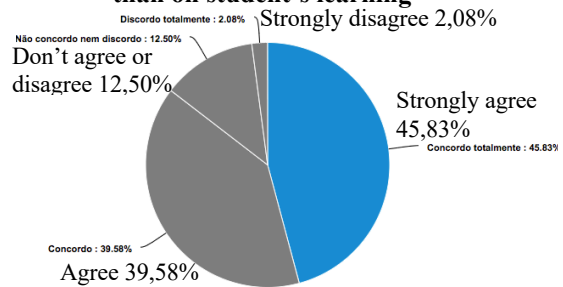
Source: Author

**9. All students should be considered equally important.**



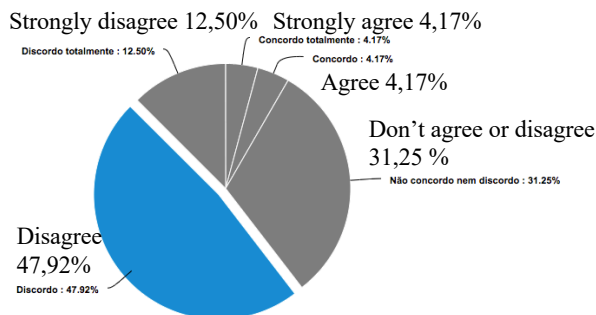
Source: Author

**10. The education system is more focused on tests rather than on student's learning**



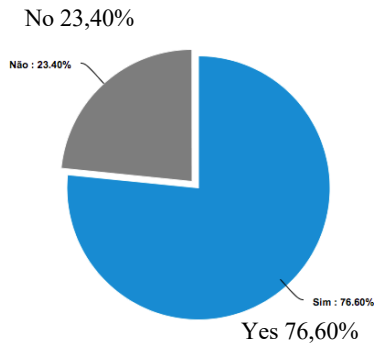
Source: Author

**11. The assessment system is the most appropriate.**



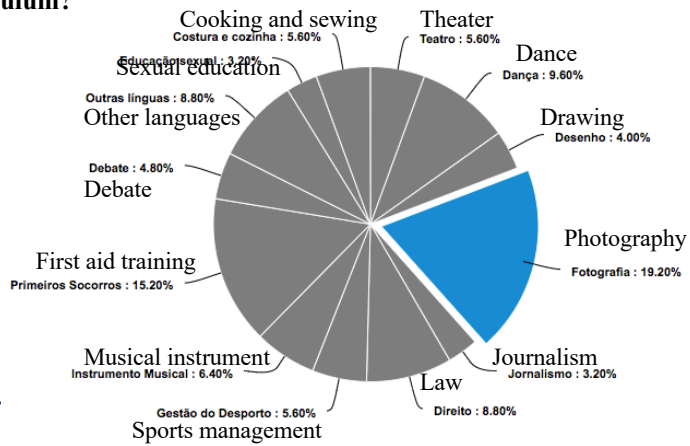
Source: Author

**12. Would you like to, after choosing the secondary course, have the opportunity to attend subjects outside of the pre-defined curriculum?**



Source: Author

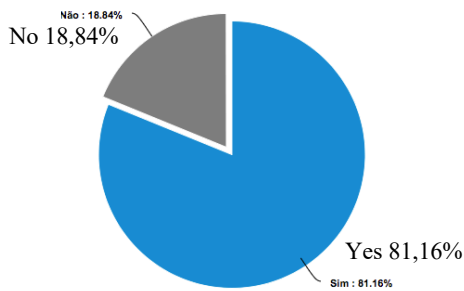
**13. Select which ones.**



Source: Author

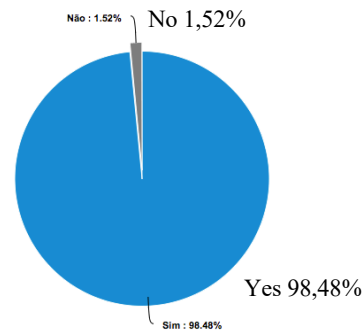
**Annex 6 – Answers to questionnaire 2**

**3. Did you attend any extracurricular activities outside school?**



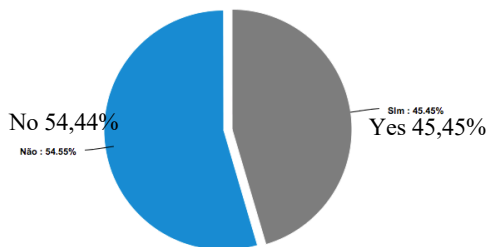
Source: Author

**4. Do you like art?**



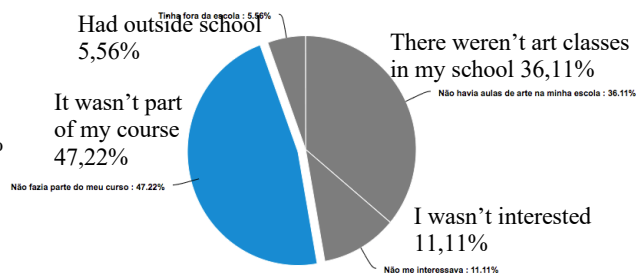
Source: Author

**5. Did you have art classes in school?**



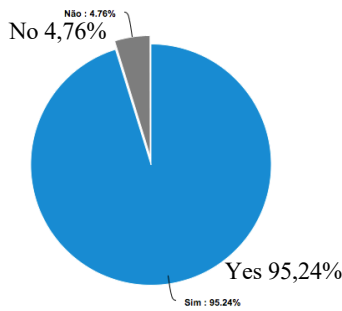
Source: Author

**b) If no, why?**



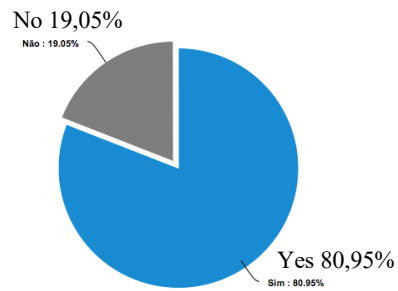
Source: Author

**6. Do you like sports?**



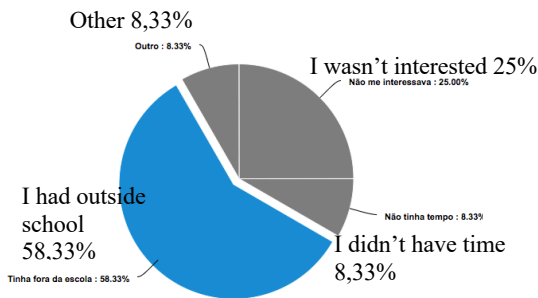
Source: Author

**7. Did you practice sports at school?**



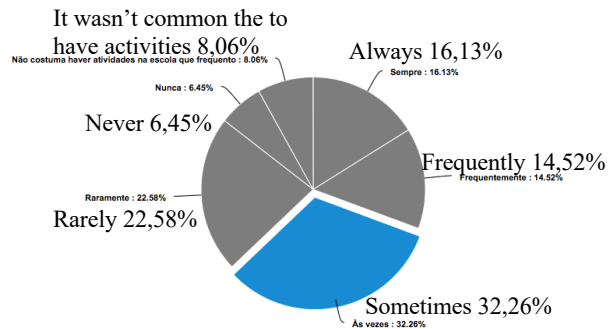
Source: Author

**b) If no, why?**



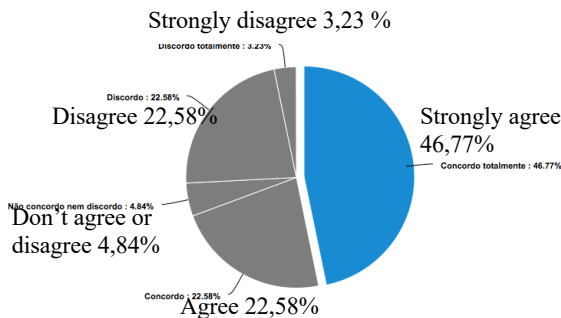
Source: Author

**8. How often did you attend activities in school?**



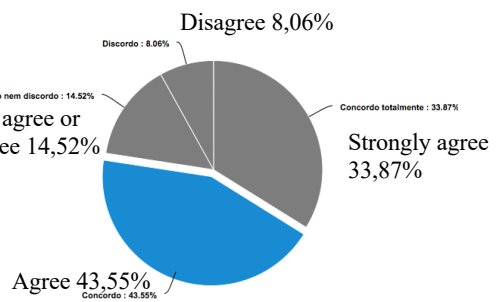
Source: Author

**9. All subjects should be considered equally important.**



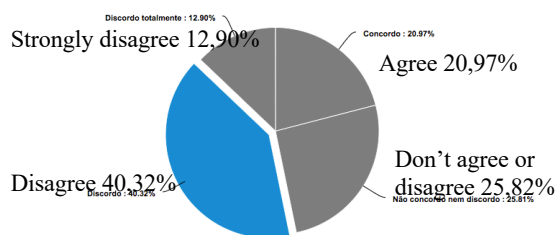
Source: Author

**10. The education system was more focused on tests rather than on student's learning.**



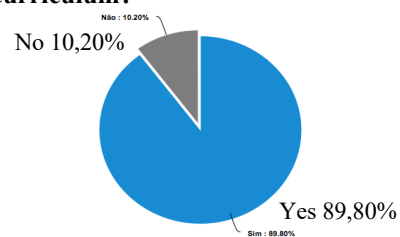
Source: Author

**11. The assessment system was the most appropriate.**



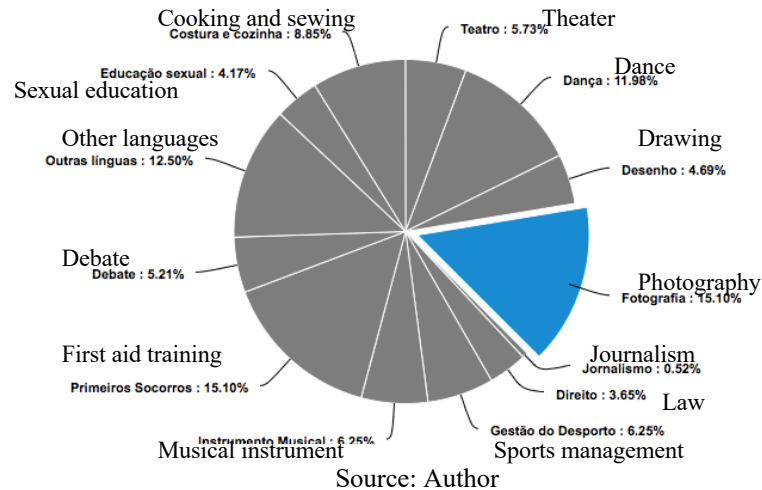
Source: Author

**12. Would you have liked to, after choosing the secondary course, have the opportunity to attend subjects outside of the pre-defined curriculum?**



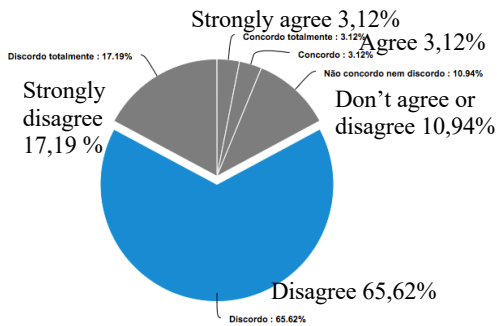
Source: Author

**14. Select which ones.**

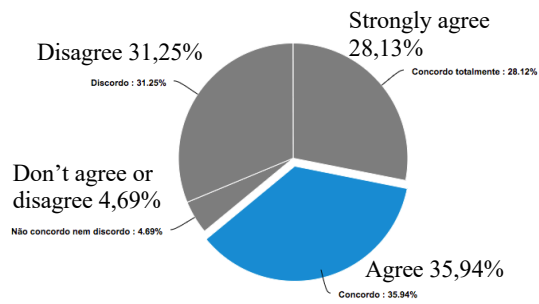


**Annex 7 – Answers to questionnaire 3**

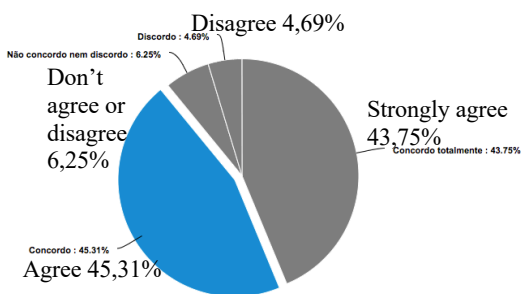
**3. Every student's needs are addressed in the current Portuguese education system**



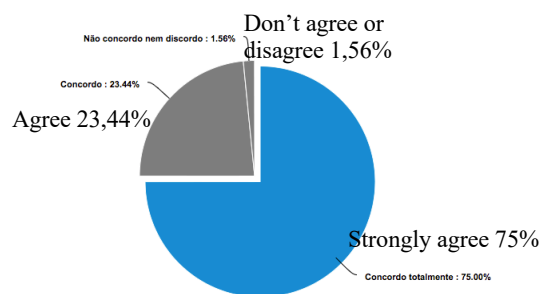
**4. All subjects must be considered equally important**



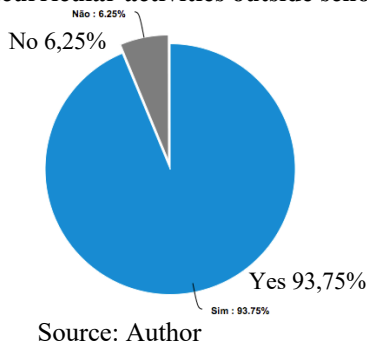
**5. The education system is more focused on tests rather than on student's learning**



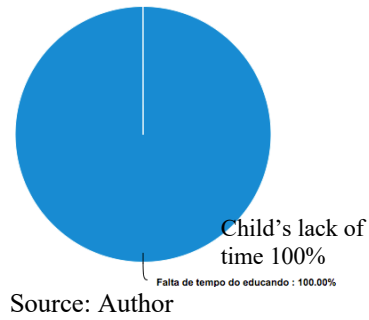
**6. It is important for students to have time after school.**



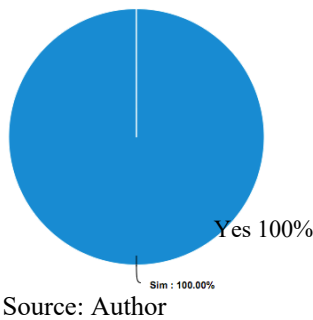
**7. Does your child attend/attended any extracurricular activities outside school?**



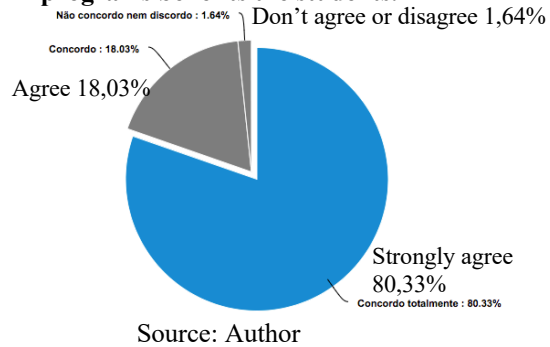
**b) If no, why?**



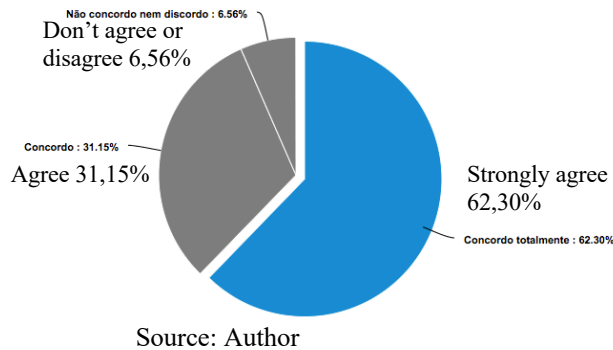
**8. Do you consider the arts and sports important for education?**



**9. A school that offers arts and sports programs benefits the students.**

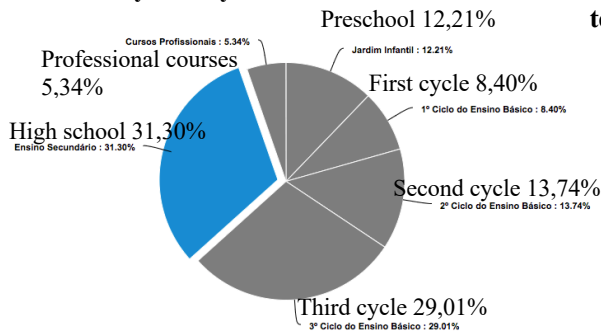


**10. It is important for students, after choosing their secondary course, to have the opportunity to attend subjects outside their pre-defined curriculum.**

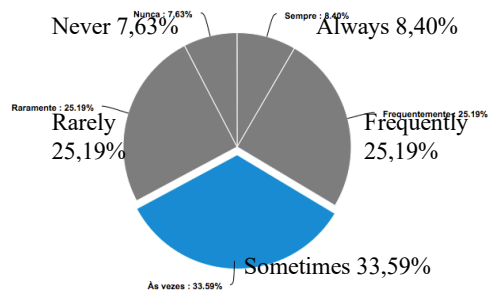


**Annex 8 – Answers to questionnaire 4**

**1. Which cycle do you teach?**

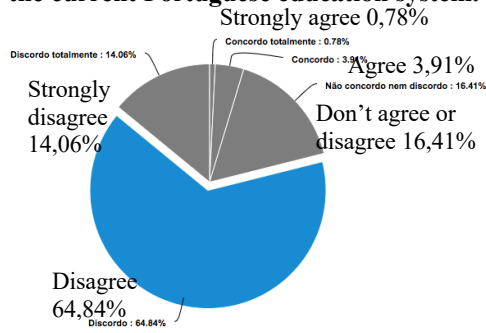


**3. How often do you collaborate with teachers from other subjects to plan classes?**



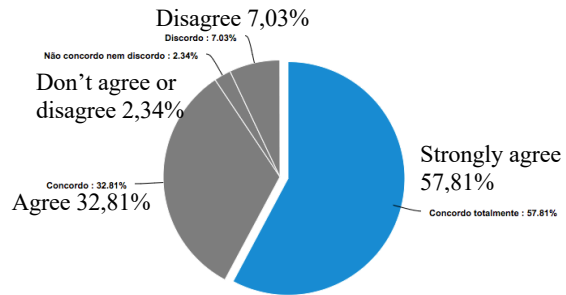


**4. Every student's needs are addressed in the current Portuguese education system.**



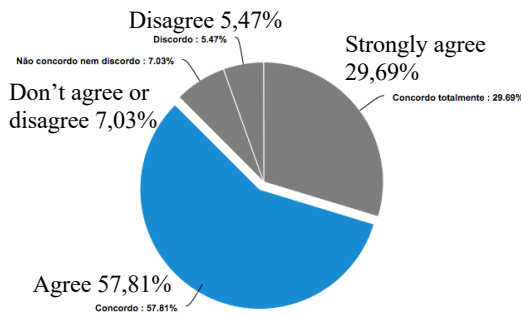
Source: Author

**5. All subjects should be considered equally Important.**



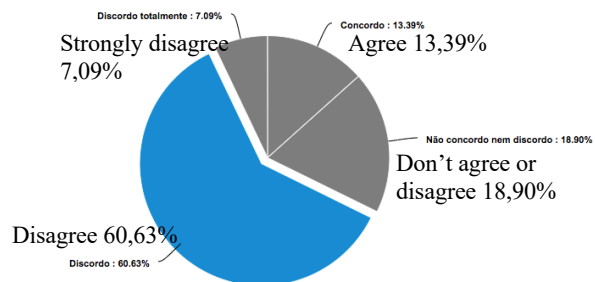
Source: Author

**5. The education system is more focused on students rather than on student's learning.**



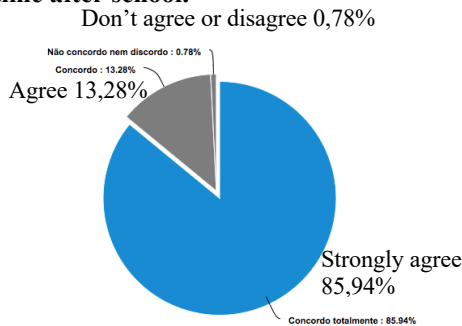
Source: Author

**6. The assessment system is the most appropriate.**



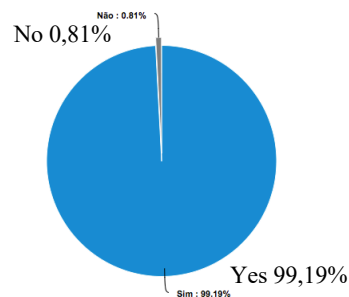
Source: Author

**7. It is important for students to have free time after school.**



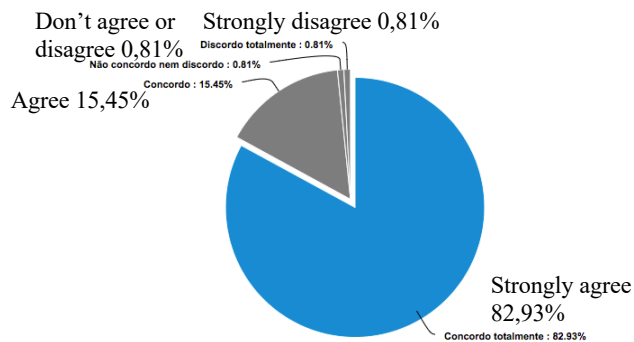
Source: Author

**8. Do you consider the arts and sports important for education?**



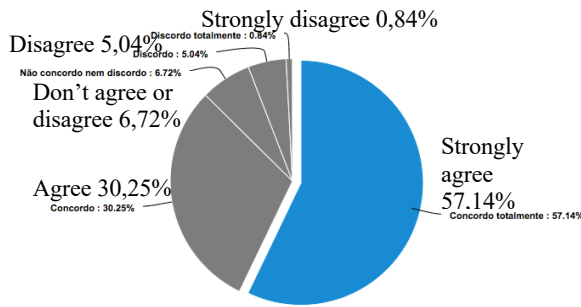
Source: Author

**9. A school that offers arts and sports programs benefit the students.**



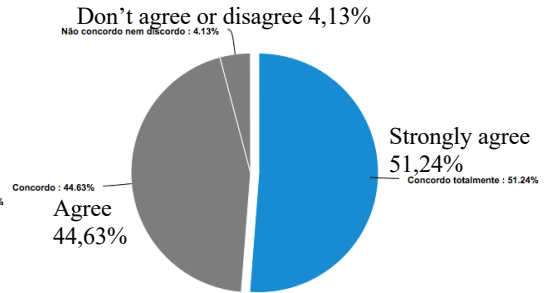
Source: Author

**10. It important to have a diverse offer of subjects since the 1<sup>st</sup> cycle.**



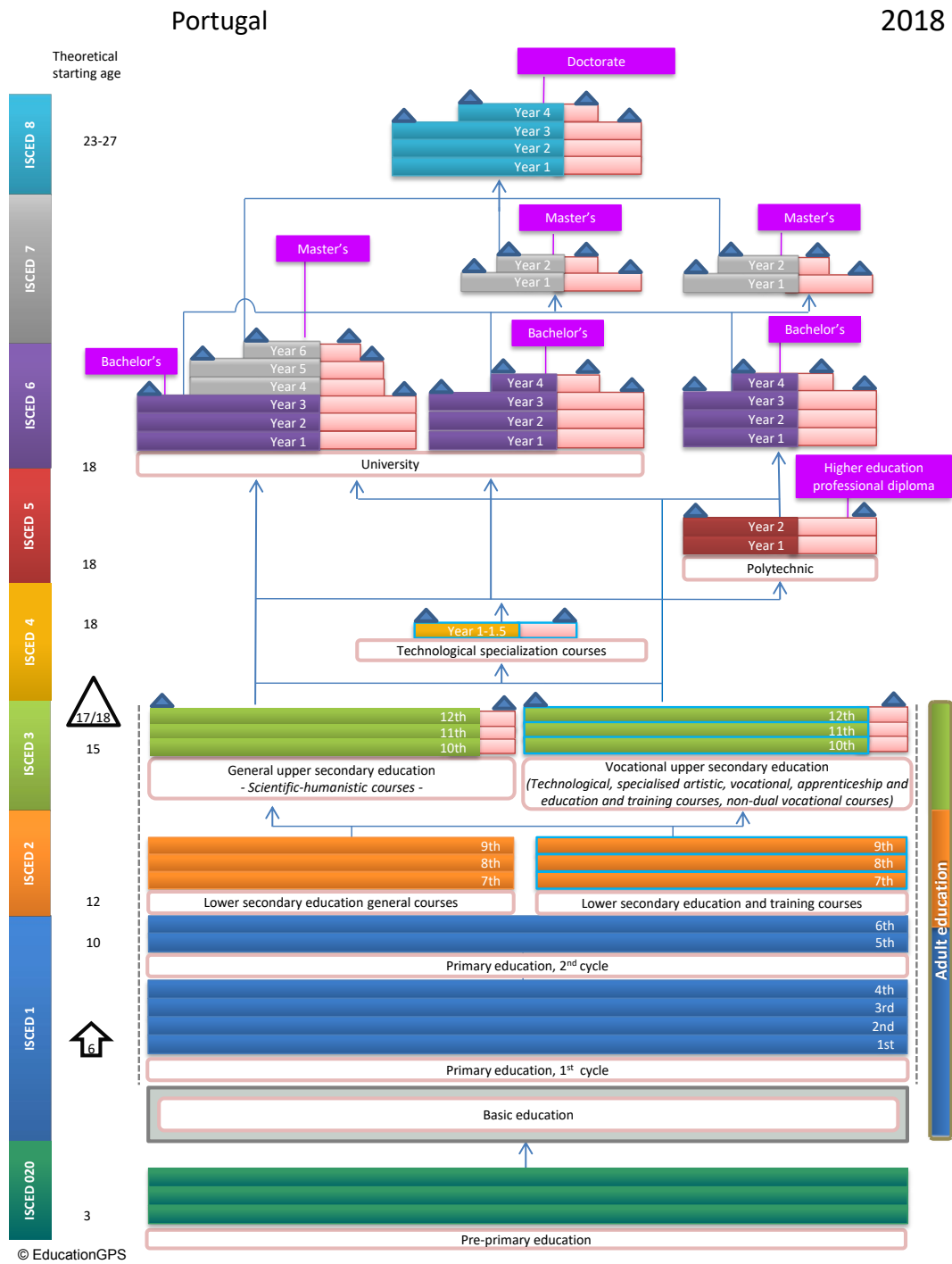
Source: Author

**11. It is important for students, after choosing their secondary course, to have the opportunity to attend subjects outside their pre-defined curriculum.**



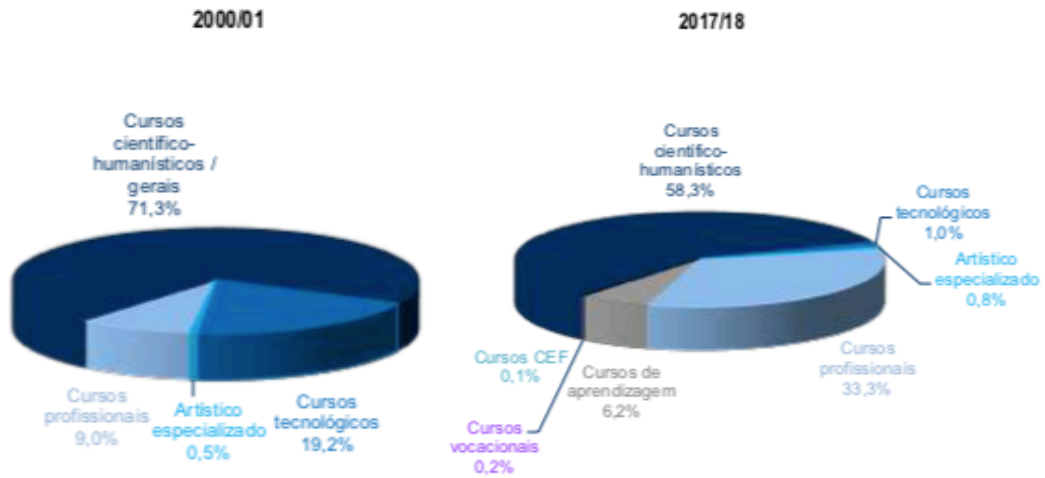
Source: Author

## Annex 9 – Diagram of the Portuguese Education System



Source: OECD, 2019

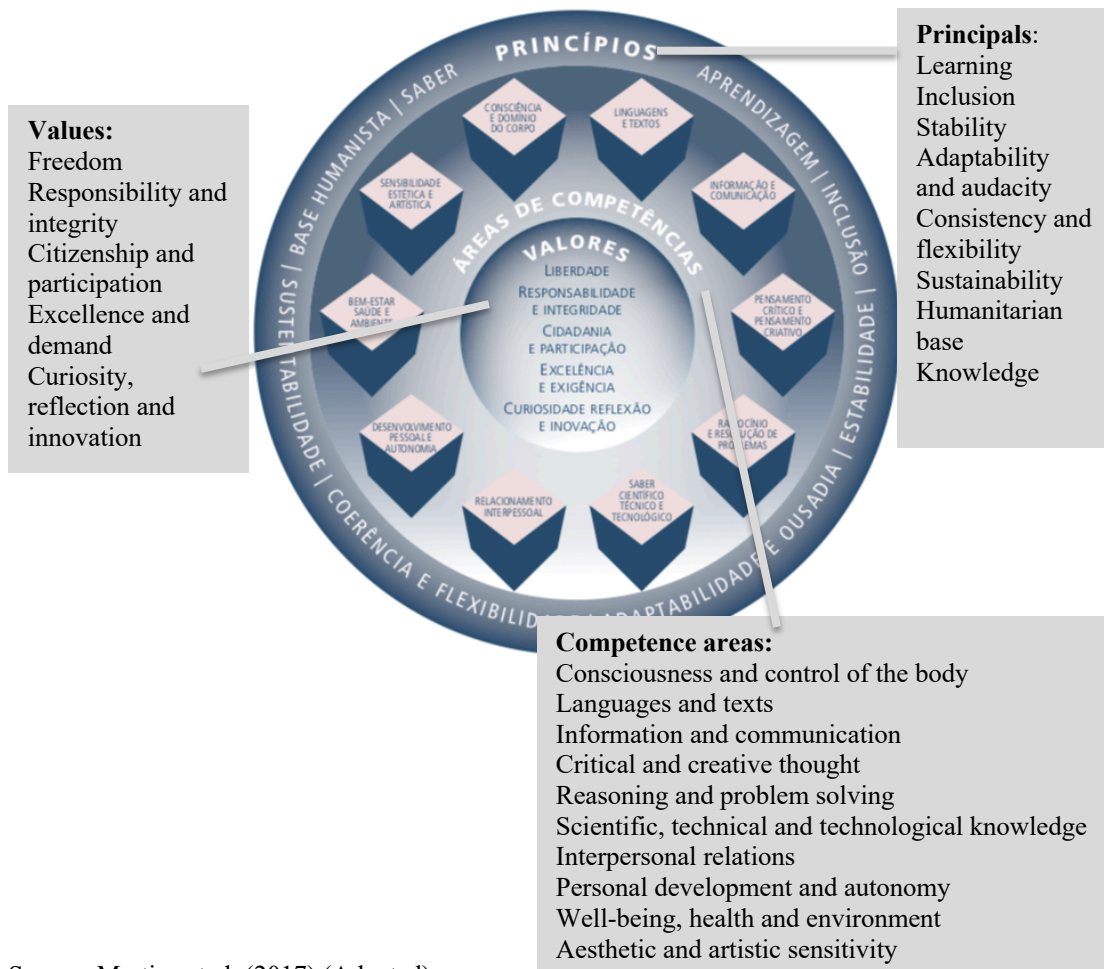
**Annex 10 – Graph with the distributions of enrolled high school students in high school by education offer**



Source: DGEEC, 2019

Legend: Humanistic and Scientific courses; Professional courses; Artistic specialized; Technological courses

**Annex 11 – Student’s profile when leaving compulsory schooling**



Source: Martins et al. (2017) (Adapted)

**Annex 12 – Mandatory and optional subjects Academia Geração offers with respective hours**

Grade	Mandatory subjects	Hours (weekly) (a)	Optional subjects (b)
<b>1<sup>st</sup></b>	Portuguese	7	No optional classes. Students have the same varied and more generalized curriculum to be familiar with different options. The only choice is between gymnastics and volleyball
	Mathematics	7	
	Science/Environment study	3	
	Artistic education (Music, dance and Theater; Visual and plastic arts)	5	
	Dance initiation	2	
	English	1	
	Physical education (Games, basic skills in sports, coordination, strength, reflexes)	1	
	Swimming	1	
	Gymnastics or volleyball (initiation)	2	
	Project – Community projects; citizenship and environmental issues	1	
<b>2<sup>nd</sup></b>	Portuguese	7	No optional classes. Students have the same varied and more generalized curriculum to be familiar with different options. The only choice is between gymnastics and volleyball
	Mathematics	7	
	Science/Environment study	3	
	Artistic education (Music and Theater; Visual and plastic arts)	3	
	Dance initiation	2	
	English	1	
	Physical education (Games, basic skills in sports, coordination, strength, reflexes)	1	
	Swimming	1	
	Gymnastics or volleyball (initiation)	2	
	Project – Community projects; citizenship and environmental issues	1	
<b>3<sup>rd</sup></b>	Portuguese	7	Choice of a form of art to pursue more deeply. For now, the only option is dance training or continuing to have general arts. In sports, choice between gymnastics and volleyball
	Mathematics	7	
	Science/Environment study	3	
	Artistic education (Music and Theater; Visual and plastic arts)	3	
	Dance initiation	2	
	English	1	
	Physical education (Games, basic skills in sports, coordination, strength, reflexes)	2	
	Swimming	1	
	Gymnastics or volleyball (initiation)	2	
	Project – Community projects; citizenship and environmental issues	1	
<b>4<sup>th</sup></b>	Portuguese	7	Choice of a form of art to pursue more deeply. For now, the only option is dance training or continuing to have general arts. In sports, choice between gymnastics and volleyball
	Mathematics	7	
	Science/Environment study	3	
	Artistic education (Music and Theater; Visual and plastic arts)	3	
	Dance initiation	2	
	English	1	
	Physical education (Games, basic skills in sports, coordination, strength, reflexes)	2	
	Swimming	1	
	Gymnastics or volleyball (initiation)	2	

*Business Plan*  
*Implementation of a school from 1<sup>st</sup> to 12<sup>th</sup> grade with integrated arts and sports programs*

	Project – Community projects; citizenship and environmental issues	1	
5 <sup>th</sup>	Portuguese	4	Cooking and sewing
	English	1	Musical Instrument
	History and Geography of Portugal	2	Theater
	Mathematics	4	Drawing and painting
	Science	2	Singing lessons/choir
	Artistic education (Music and Theater; Visual and plastic arts)	5	
	IT	1	
	Dance training	3	
	Physical education	2	
	Swimming	1	
	Gymnastics or Volleyball	3	
	Project – Community projects; citizenship and environmental issues	2	
	6 <sup>th</sup>	Portuguese	4
English		1	Musical Instrument
History and Geography of Portugal		2	Theater
Mathematics		4	Drawing and painting
Science		2	Singing lessons/choir
Artistic education (Music and Theater; Visual and plastic arts)		5	
IT		1	
Dance training		3	
Physical education		2	
Swimming		1	
Gymnastics or Volleyball		3	
Project – Community projects; citizenship and environmental issues		2	
7 <sup>th</sup>		Portuguese	3
	English	2	Journalism
	Second language (Spanish)	2	Sports management
	History	2	Law
	Geography	2	First aid training
	Mathematics	3	Debate
	Science	2	Cooking and sewing
	Physics and chemistry	2	Musical Instrument
	Artistic education (choose one from the optional subjects in each trimester)	1	Theater
	IT	1	Drawing and painting
	Dance training or Gymnastics or Volleyball	4	Singing lessons/choir
	Physical education	2	
	Community project and citizenship	2	
8 <sup>th</sup>	Portuguese	3	Photography
	English	2	Journalism
	Second language (Spanish)	2	Sports management
	History	2	Law
	Geography	2	First aid training
	Mathematics	3	Debate
	Science	2,5	Cooking and sewing
	Physics and chemistry	2,5	Musical Instrument
	Artistic education (choose one from the optional subjects in each trimester)	1	Theater
	IT	1	Drawing and painting
	Dance training or Gymnastics or Volleyball	4	Singing lessons/choir

*Business Plan*  
*Implementation of a school from 1<sup>st</sup> to 12<sup>th</sup> grade with integrated arts and sports programs*

	Physical education	2	
	Community project and citizenship	2	
<b>9<sup>th</sup></b>	Portuguese	3	Photography
	English	2	Journalism
	Second language (Spanish)	2	Sports management
	History	2	Law
	Geography	2	First aid training
	Mathematics	3	Debate
	Science	2,5	Cooking and sewing
	Physics and chemistry	2,5	Musical Instrument
	Artistic education (choose one from the optional subjects in each trimester)	1	Theater
	IT	1	Drawing and painting
	Dance training or Gymnastics or Volleyball	4	Singing lessons/choir
	Physical education	2	
	Community project and citizenship	2	
	<b>10<sup>th</sup></b>	Portuguese	3
English		2,5	Journalism
Philosophy		2,5	Sports management
Physical Education		2	Law
Mathematics, Drawing or		4	First aid training
Biology & Geology; Physics & Chemistry; Geometry; History; Geography; Economy; Mathematics for social science; Portuguese Literature; Second foreign language; History of Culture and Art; Mathematics B (choose 2) * These subjects can be chosen as optional as well		8	Debate and political science
Dance training or Gymnastics or Volleyball		5	Cooking and sewing
Community project and citizenship		1	Musical Instrument
			Theater
			Drawing and painting
			Singing lessons/choir
<b>11<sup>th</sup></b>		Portuguese	4
	English	1,5	Journalism
	Philosophy	2,5	Sports management
	Physical Education	2	Law
	Mathematics A, Drawing or History	4	First aid training
	Biology & Geology; Physics & Chemistry; Geometry; History; Geography; Economy; Mathematics for social science; Portuguese Literature; Second foreign language; History of Culture and Art; Mathematics B (choose 2) * These subjects can be chosen as optional as well	8	Debate and political science
	Dance training or Gymnastics or Volleyball	5	Cooking and sewing
	Community project and citizenship	1	Musical Instrument
			Theater
			Drawing and painting
			Singing lessons/choir
	<b>12<sup>th</sup></b>	Portuguese	4,5
English		1,5	Journalism
Physical Education		2	Sports management
Mathematics A, Drawing or History		4,5	Law
Dance training or Gymnastics or Volleyball		5	First aid training
Community project and citizenship		1	Debate and political

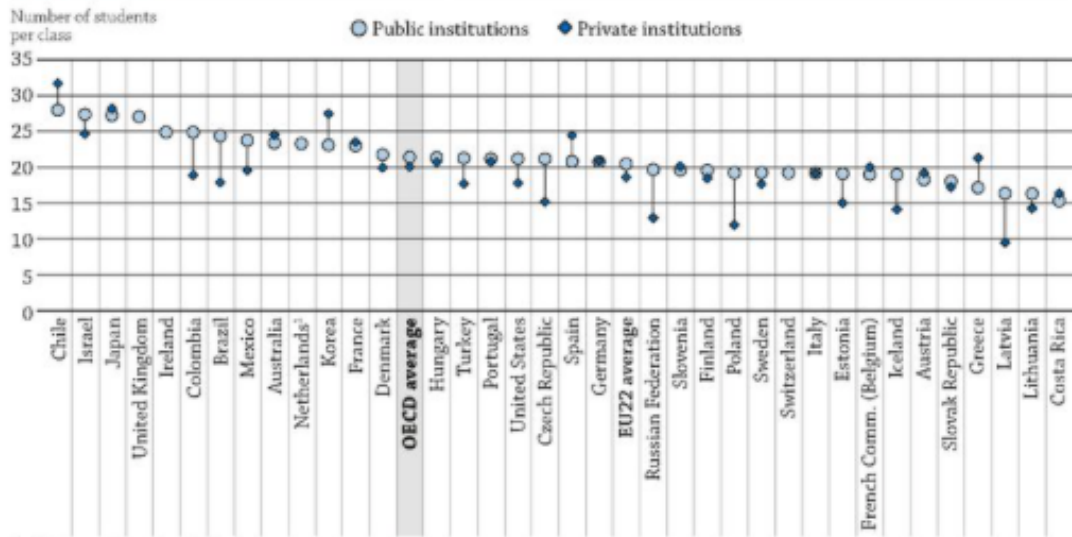
*Business Plan*  
*Implementation of a school from 1<sup>st</sup> to 12<sup>th</sup> grade with integrated arts and sports programs*

science		
Art workshop; Multimedia; Materials and Technology; Philosophy; Geography; Psychology; Sociology; Second foreign language; Economy; Chemistry; Physics; Biology; Geology (choose 2) * These subjects can be chosen as optional as well	3	Cooking and sewing
Dance training or Gymnastics or Volleyball	5	Musical Instrument
Community project and citizenship	1	Theater
Drawing and painting		
Singing lessons/choir		

- (a) The hours spent in each subject may be adjusted  
 (b) Students have to choose 1 optional subject in each trimester in 5<sup>th</sup> and 6<sup>th</sup> grade; 2 optional subjects in each trimester in 7<sup>th</sup> and 8<sup>th</sup> grade; 2 optional subjects for the whole year in the 9<sup>th</sup>, 10<sup>th</sup>, 11<sup>th</sup> and 12<sup>th</sup> grade. 1 hour each class.

Source: Author

**Annex 13 – Average class size in primary education by type of education in 2016 in OECD countries**



Source: OECD, 2018



### Annex 14 – Number of federated athletes from 2007 to 2017

Data reference period	Geographic localization									
		Total	Handball	Athletics	Automobilism	Basketball	Cycling	Columbofilia	Football	Gymnastics
		No.	No.	No.	No.	No.	No.	No.	No.	No.
2017	Portugal	624 001	49 812	18 766	3 512	41 807	15 739	8 387	176 349	18 312
2016	Portugal	590 668	49 981	14 542	3 498	40 135	15 444	8 602	168 097	16 259
2015	Portugal	567 787	50 244	15 284	3 022	36 688	14 637	8 754	162 144	14 004
2014	Portugal	544 513	50 114	14 835	3 026	35 590	13 226	9 495	157 097	13 740
2013	Portugal	525 072	46 405	14 991	2 399	38 347	10 609	9 893	154 539	14 322
2012	Portugal	525 238	40 373	14 484	2 318	39 996	9 052	10 536	154 601	13 441
2011	Portugal	524 250	39 877	14 565	2 422	40 241	8 511	11 264	153 882	11 636
2010	Portugal	519 359	39 708	14 998	2 972	41 830	8 087	11 715	148 497	8 047
2009	Portugal	513 009	37 562	14 500	2 540	40 250	7 654	13 321	144 557	6 482
2008	Portugal	489 283	33 902	13 576	2 508	36 320	6 079	13 967	142 498	5 613
2007	Portugal	484 702	32 257	11 954	2 692	34 026	5 263	14 602	136 999	14 701

MF												
Golf	Judo	Karate	Swimming	Roller skating	Sport fishing	Rugby	Tennis	Table tennis	Shooting	Sailing	Volleyball	
No.	No.	No.	No.	No.	No.	No.	No.	No.	No.	No.	No.	No.
5 847	12 702	13 231	65 499	15 892	2 559	6 460	16 139	3 581	4 018	2 367	44 208	
4 659	12 302	13 135	52 355	13 423	2 503	6 480	15 755	3 656	4 032	2 377	43 625	
4 248	12 208	12 064	43 083	12 270	2 652	6 324	16 159	3 426	3 980	2 225	43 120	
4 094	12 460	14 734	21 695	11 810	2 841	6 683	19 276	3 286	3 982	1 841	43 076	
3 825	13 135	15 315	11 651	11 807	2 892	6 449	18 459	2 987	4 018	1 874	43 023	
4 198	12 265	16 096	11 232	11 000	3 313	6 180	25 768	3 050	3 995	1 914	43 061	
4 655	12 498	15 469	11 277	11 151	3 566	5 465	25 491	3 042	3 874	2 051	43 240	
4 656	12 576	16 683	11 380	10 269	3 930	5 224	25 941	3 282	3 929	x	42 386	
4 545	11 669	16 069	10 127	10 765	3 362	4 879	25 550	3 205	3 833	2 868	40 090	
4 769	12 313	14 511	9 259	10 402	3 528	4 727	18 971	3 142	3 774	2 887	40 898	
4 342	11 783	14 593	8 276	10 368	3 411	3 410	17 786	3 445	4 583	3 043	36 244	

Source: National Institute of Statistics 2018

### Annex 15 – Number of enrolled students by educational level and region

NUTS I e II	Total	Educação pré-escolar	Ensino básico			Ensino secundário	
			Total	1.º Ciclo	2.º Ciclo		3.º Ciclo
Portugal	1 628 985	240 231	987 704	401 476	220 184	366 044	401 050
Continente	1 541 992	227 938	933 684	379 345	208 364	345 975	380 370
Norte	552 308	78 750	331 668	132 400	73 552	125 716	141 890
Centro	323 859	47 615	193 053	77 006	42 802	73 245	83 191
A. M. Lisboa	484 537	73 624	297 272	124 280	66 783	106 209	113 641
Alentejo	107 758	16 466	65 530	26 417	14 813	24 300	25 762
Algarve	73 530	11 483	46 161	19 242	10 414	16 505	15 886
R. A. Açores	43 822	6 712	27 206	11 463	5 912	9 831	9 904
R. A. Madeira	43 171	5 581	26 814	10 668	5 908	10 238	10 776

Source: DGEEC, 2019

Legend: A.M. Lisboa – Metropolitan Area of Lisbon

### **Annex 16 – Academia Geração’s admission form**

Student’s name

Date of birth      Female     Male

ID number

Year

Grade

Previous school

Grade previously attending

Reason to choose Academia Geração

Location   
Educational project   
Infrastructures   
Other

How did you get to know the school?

Family member   
Friend   
Site   
Media   
Other

Any siblings in Academia Geração?    Yes                   No

Does the student have any contact with the arts?    Yes                   No

Does the students have any contact with sports?    Yes                   No

Source: Author

### **Annex 17 – Competitors table**

*Business Plan*  
*Implementation of a school from 1<sup>st</sup> to 12<sup>th</sup> grade with integrated arts and sports programs*

Competitor	School fee (monthly) 1 <sup>st</sup> cycle 2 <sup>nd</sup> cycle 3 <sup>rd</sup> cycle Secondary	Educational project	Activities	Target	Number of students	Location	Competitive Advantage
<i>Colégio Vasco da Gama</i>	459€ 465€ 497,5€ 500€	Regular Portuguese Academic Curriculum with didactic interventions and teaching methods	Music Conservatory; Swimming; Back horse riding; Tennis; Ballet; Dance; Gymnastics; Karate; Soccer; Judo; Guitar; Robotics and Electronics Program; Theater	Students from preschool to 12 <sup>th</sup> grade, mainly from the <i>Sintra</i> area, coming from advantaged socioeconomic families	700	<i>Meleças, Sintra</i>	Music Conservatory program in the school
<i>Escola Casa da Floresta</i>	525€ 545€	Regular Portuguese Academic Curriculum Based on Waldorf pedagogy	Activities not specified	Students from preschool to 6 <sup>th</sup> grade who wish to have much contact with nature and art and a different approach to education	-	<i>Monsanto, Lisbon</i>	Innovative approach to education – focus on ecology and contact with nature
<i>Colégio Cesário Verde</i>	396,36€	Use of the arts in the learning process. The arts are present in the entire educational experience of the student with the regular Portuguese academic curriculum as reference	Performing arts; Dance; Music; Swimming; Volleyball; Judo; Gymnastics; “The Inventors” Club; “Happy Code” Club; Science Club	Students from nursery until 9 <sup>th</sup> grade from different social, economical and cultural background and who want a strong arts presence in their education	500	<i>Marvila, Lisbon</i>	Arts presence in the entire educational process
<i>Colégio Pedro Arrupe</i>	612€ 496€ 508€ 541€	Regular Portuguese Academic Program based on Ignatian pedagogy (leading by faith)	Nautical activities; Dance; Football; Volleyball; Rugby; Judo; Tennis; Karate; Theater; Gymnastics; Hip Hop; Inventors program	Catholics of all school ages who want a demanding education with nautical activities and a religious presence	1710	<i>Parque das Nações, Lisbon</i>	Closeness to the river and great variety of extracurricular activities

*Business Plan*  
*Implementation of a school from 1<sup>st</sup> to 12<sup>th</sup> grade with integrated arts and sports programs*

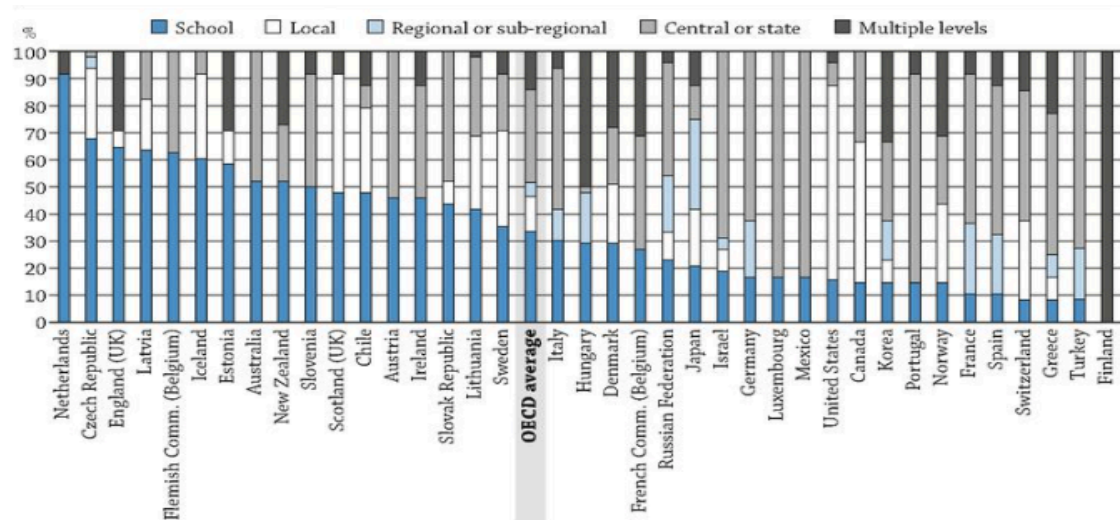
<i>Academia de Música de Santa Cecília</i>	490€ 478€ 480€ 520€	Regular Portuguese Academic Program. Traditional school focused on academics with the extra offer of musical education	Integrated music program; Volleyball; Futsal; Judo; Chez; Ballet; Swimming; Drawing and painting atelier	Students of all school ages who wish to complete their education with an integrated music program	630	<i>Ameixoeira, Lisbon</i>	Integrated music program that allows students to pursue music after high school
<i>Conservatório Nacional de Dança</i>	0€	Academic education and dance training program, mainly focused on classical ballet technique along with modern dance training	Dance	Students from 5 <sup>th</sup> to 12 <sup>th</sup> grade who want to pursue a dance career	180	<i>Baixa, Lisbon</i>	Dance training program in the same school as academic education
<i>Colégio São João de Brito</i>	484€ 491€ 491€ 556€	Regular Portuguese Academic Program with an Ignatian vision	Religious development activities; Sports; Games for younger students; Swimming; Foreign languages; Creative Sewing; Theater; Handball; Gymnastics; Volleyball; Soccer; Eco Schools; Junior Achievement; <i>Tardes Magis</i>	Catholics students from preschool to 12 <sup>th</sup> grade who want a demanding academic education in a big school with extracurricular activities	1468	<i>Lumiar, Lisbon</i>	Good academic results and high quality extracurricular activities
<i>Colégio de São Tomás</i>	470€ 490€ 503€ 547€	Non-profit organization (PSSI) with the regular Portuguese academic program and based on Christian tradition. More subjects offered and a more generalized education than usual at secondary level	Foreign languages (German, Latin and Mandarin); Plastic arts; Music; Drama; Programming and informatics; Guitar; Ballet; Fencing; Judo; Karate; Taekwondo; Music; Gymnastics; Soccer; Basketball; Volleyball; Photography	Students from preschool to 12 <sup>th</sup> grade from different socioeconomic background who want different extracurricular activities and a more generalized education at secondary level	-	<i>Quinta das Conchas, Lisboa</i>	PSSI – students from disadvantaged families have the opportunity to have access to high quality education and adaptation of the secondary Portuguese curriculum

*Business Plan*  
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<i>Escola Artística António Arroio</i>	0€	Specialized arts courses according to the Portuguese program	Artistic Production (ceramics, engraving and silkscreen, jewelry, textile and performance direction); Product Design; Audiovisual Communication (specialization in cinema and video, photography, sound and multimedia); Communication Design; Workshops; Field trips; Conferences; Contests; Known authors exhibitions	Secondary students who want a deeper education in the arts or wish to pursue it professionally	1250	<i>Olaias, Lisbon</i>	Good and recognized specialized art courses
<i>Os aprendizes</i>	420€ 430€ 440€ 450€	Own pedagogy with the child in the center of the learning process. Regular Portuguese academic program with a theme that connects the subjects and many activities that enrich the curriculum	Music; PE; Foreign languages (English, German, French and Spanish); Yoga; Meditation; Drama; Vegetable garden; Philosophy; Informatics; Volunteer work	Students from preschool to 12 <sup>th</sup> grade who want to have a different approach to education, less traditional	330	<i>Birre, Cascais</i>	Innovative approach to teaching

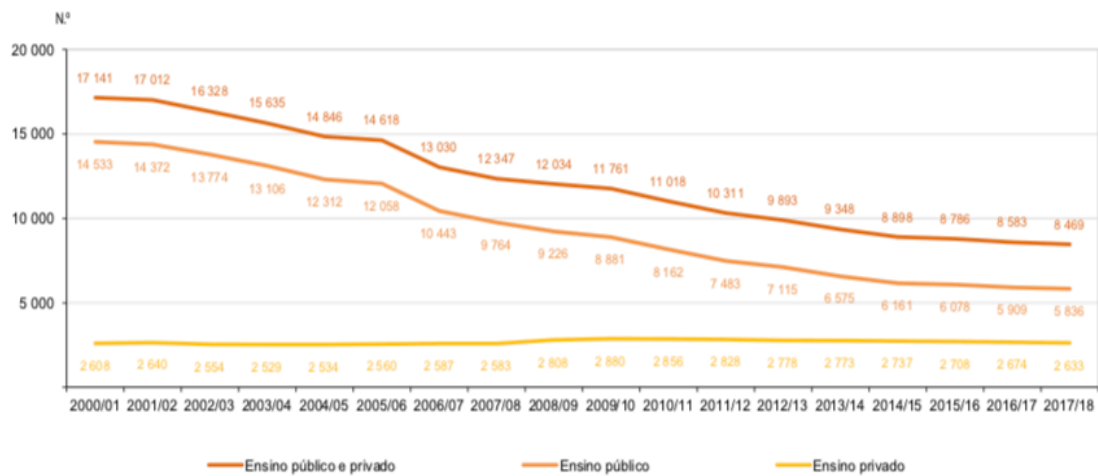
Source: Author

### Annex 18 – Percentage of decisions taken at each level of government in public lower secondary education in 2017



Source: OECD, 2018

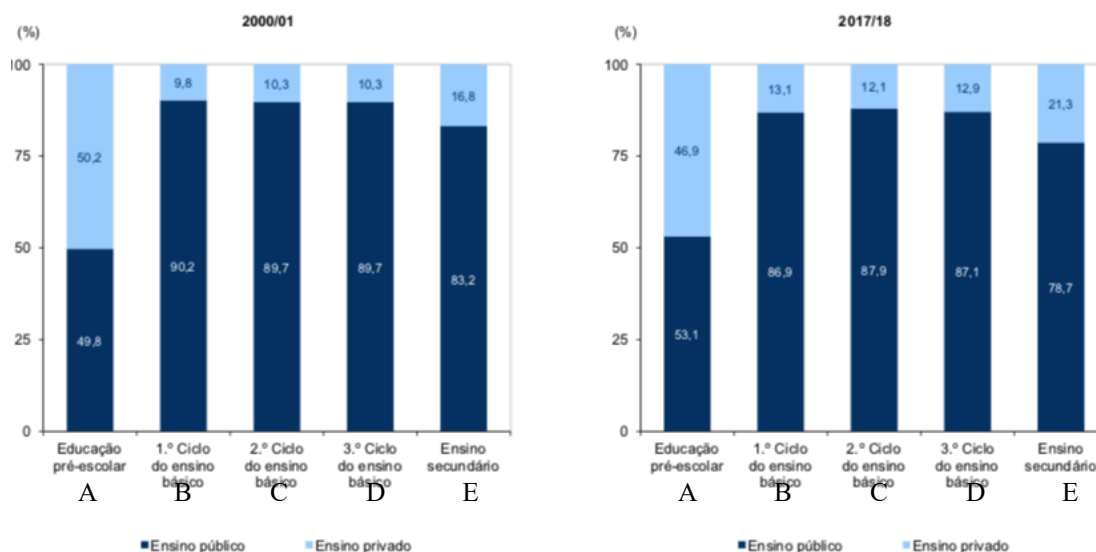
### Annex 19 – Number of educational institutions by nature from 2000 to 2018



Source: DGEEC, 2019

Legend: Private and public schools; Public schools; Private schools

### Annex 20 – Distribution of enrolled students in education institutions by school level in 2000/2001 and 2017/2018



Source: DGEEC, 2019

Legend: Public schooling; Private schooling. A- Preschool; B- 1<sup>st</sup> cycle; C- 2<sup>nd</sup> cycle; D- 3<sup>rd</sup> cycle; E- Secondary

### Annex 21 – Number of students' concluding high school

Ano letivo	Oferta de educação e formação																	
	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Total	65 395	66 477	74 013	65 125	64 559	66 317	78 951	72 066	128 661	137 855	111 020	115 231	116 082	108 417	84 781	89 650	96 366	100 290

Source: DGEEC, 2019

Legend: A- School year; B- Educational offer

### Annex 22 – Average number of students per computer with access to the Internet by nature of the establishment and grade

Natureza e nível de ensino	Ano letivo	Ano letivo															
		2001/02	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	
Ensin. público e privado		33,8	16,1	14,0	11,7	8,9	2,3	2,2	2,2	3,6	3,5	3,5	3,6	4,0	4,8	5,0	
Ensin. público		38,9	18,2	15,7	12,8	9,6	2,2	2,1	2,1	3,8	3,6	3,5	3,5	3,9	4,7	5,2	
1.º Ciclo do ensino básico		52,3	38,4	26,5	22,4	14,4	1,1	1,0	1,1	3,5	7,6	6,8	6,4	6,7	7,7	7,4	
2.º Ciclo do ensino básico		38,6	15,6	13,9	10,6	8,4	5,2	4,6	4,2	4,0	3,0	2,9	2,9	3,3	4,1	4,7	
3.º Ciclo do ensino básico		36,1	14,6	13,3	10,6	8,2	5,1	4,5	4,1	3,9	2,9	2,9	2,8	3,3	4,0	4,5	
Ensino secundário		29,0	12,2	11,2	9,5	7,6	5,0	4,5	4,1	3,9	2,8	2,8	2,8	3,2	3,9	4,4	
Ensin. privado		17,6	9,0	8,2	7,6	6,2	2,8	2,5	2,5	2,8	3,0	3,6	4,3	4,7	5,0	4,5	
1.º Ciclo do ensino básico		39,7	15,1	13,8	11,7	8,9	1,2	1,1	1,1	1,3	1,6	2,4	5,3	5,7	6,1	5,9	
2.º Ciclo do ensino básico		29,8	13,0	11,6	10,6	9,4	8,7	7,6	7,7	7,8	7,1	6,9	6,4	7,1	7,1	6,3	
3.º Ciclo do ensino básico		28,2	12,0	10,5	9,2	7,2	6,7	6,1	6,2	6,1	6,0	5,8	5,3	5,8	6,3	5,2	
Ensino secundário		9,0	5,4	4,8	4,8	4,0	3,7	3,5	3,6	3,7	3,2	3,2	3,2	3,4	3,7	3,4	

Source: DGEEC, 2019

Legend: A- School year; B- Nature and level of teaching; C- Public and private schooling; D- Public schooling; E- 1<sup>st</sup> cycle; F- 2<sup>nd</sup> cycle; G- 3<sup>rd</sup> cycle; H- secondary; I- Private schooling; J- 1<sup>st</sup> cycle; K- 2<sup>nd</sup> cycle; L- 3<sup>rd</sup> cycle; M- Secondary

**Annex 23 – Porter’s five forces**

Porter’s five forces	Contribution to the force				
	Very Low	Low	Medium	High	Very High
<b>Competitive Rivalry</b>					
Number of competitors					
Customer’s loyalty					
Switching costs for customers					
Differentiation of the product					
Competitors’ location					
Product Costs					
<b>Bargaining power of suppliers</b>					
Number of suppliers					
Ability to substitute suppliers					
Costs of changing suppliers					
Suppliers’ uniqueness					
Information available on suppliers					
<b>Bargaining power of buyers</b>					
Number of customers					
Ability to substitute					
Importance of the product to the customers					
Customer’s demand					
Price sensitivity					
Costs of changing to substitute					
Information available for the customers about the industry					
<b>Threat of substitute products</b>					
Available substitutes					
Switching costs to a substitute					
Product differentiation offered by the substitutes					
Barriers to switch to a substitute					
<b>Threat of new entrants</b>					
Entrance costs					
Government policies and legislation					
Training and experience requirements					
Brand notoriety					
Service differentiation					

Source: Author

**Annex 24 – Strategic partnerships**

Company	Description
<b>Multiway</b>	A study abroad company that can offer many different experiences abroad for students. Since they are experts in the matter, they can better help students.
<b>Apoiarte – Casa do Artista</b>	A company that support the arts and Portuguese artists.

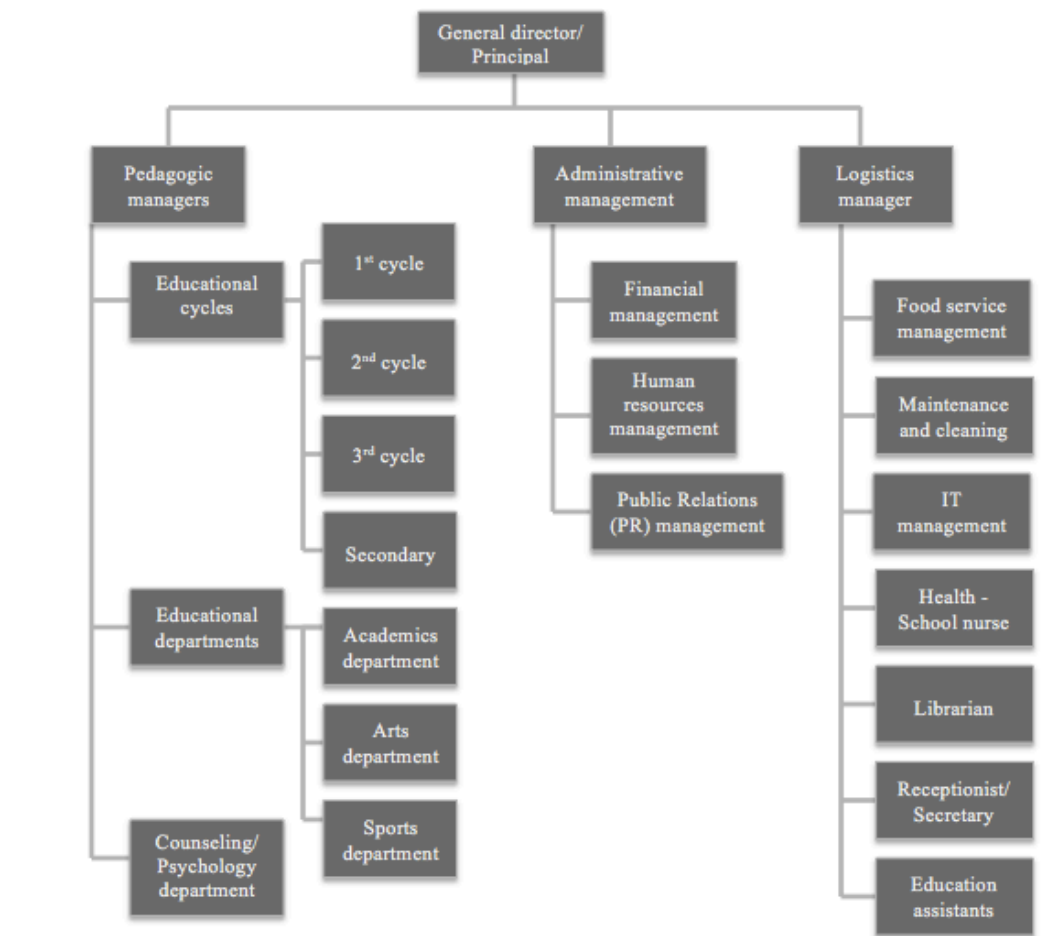


	Their connections and services can help diversify Academia Geração's offer, promote students' work help their career, and the school can also be another platform for them to support the arts.
<b>IPDJ</b>	Support for the practice of sports – communication, assessment, materials, human resources and financial support.
<b>Local pool</b>	Since having a pool in the school is big investment, a partnership with a local pool is established so students can have the mandatory swimming lessons.
<b>Santander bank</b>	A bank that has been recognized as the most sustainable in the world and has history in having scholarships for university students. It can be interesting for them to support the arts and sports in Portugal by financing low-income students to attend Academia Geração and having a bank as a partner can be very beneficial for the school as well.
<b>Portuguese universities</b>	Partnerships with different universities in Portugal, especially arts and sports universities to allow students to visit campus and learn about their options. Also, it a way for the university to get to know the students and their potential.
<b>Foreign universities</b>	Partnerships with foreign universities that may offer better conditions for students. Arrange visits to the universities for high school students, make the universities know them, have teachers to come to Academia Geração to teach or provide a workshop and arrange auditions or tryouts for students.
<b>Crédito Agrícola - Sports and cultural center</b>	As they created conditions for their workers to experience culture, sports, interpersonal relations and time for leisure, it would be interesting to support a school that promotes the same thing. They can spread the word about the school among workers and we can create conditions for their workers' children to attend the school. Since it is a bank and culture is a concern, they could finance students from low-income families as well.

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Source: Author

**Annex 25 – Organizational chart**



Source: Author

**Annex 26 – Tasks of each position, number of employees and monthly salary**

Function	Main responsibilities	#	Average Monthly Salary
General director/ Principal	<ul style="list-style-type: none"> <li>- Oversee every decision made</li> <li>- Set the direction of the school</li> <li>- Obtaining financing</li> <li>- Coordination and supervision of the staff</li> <li>- Guarantee the compliance of the laws and regulations</li> <li>- Update the internal regulations and educational project – guarantee its compliance</li> <li>- Manage and control the students’ selection process and spots available</li> <li>- Approve the annual activities plan</li> <li>- Evaluate faculty</li> <li>- Preside pedagogical council</li> </ul>	1	4 500€
Pedagogic managers	<ul style="list-style-type: none"> <li>- In charge of the pedagogical council - Conduct monthly meetings for assessment and improvements of the program and curriculum and implement the strategies defined in the meetings</li> <li>- Develop projects for students</li> <li>- Establish school’s program and curriculum</li> </ul>	3	Teachers and counselors

*Business Plan*  
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Academics department	- Articulate the academic subjects with the arts and sports programs		
	- Assessment strategies development		
	- Suggest pedagogic innovation		
	- Support students' initiatives		
Arts department	- Organize the contents within the lecture's workload		
	- Ensure students are following the contents		
	- Define teaching approaches	2	Teachers
	- Ensure every teacher is up to date and part of the decision-making		
Sports department	- Organize the contents within the lecture's workload		
	- Ensure students are following the contents		
	- Define teaching approaches	2	Teachers
	- Ensure every teacher is up to date and part of the decision-making		
Counseling/ Psychology department	- Curriculum advice to students		
	- School-community agent – opportunities outside school	1/80 students	2 500€
	- Inform students about superior education and professional careers		
Administrative management	- Administrative department compose by financial manager, human resources manager and communications (PR) manager	-	-
Financial manager	- Budget	1	3 000,00€
	- Salary Management		
Human resources manager	- Teacher recruitment	1	3 000,00€
	- Teacher training		
	- Teacher motivation		
Public Relations (PR) manager	- Establish communication strategies	1	3 000,00€
	- External and internal communication		
Logistics manager	- Manage the positions regarding logistics and school operations, such as receptionist/secretary, librarian and nurse, food service, cleaning and maintenance and IT	1	2 500,00€
Receptionist/ Secretary	- Welcome students		
	- Control entrance and exit of students from the school	1	1 500,00€
	- Receive guests and guide to the respective meeting/event		
Librarian	- Organize the library	1	1 750, 00€
	- Help students that need help in the library		
School Nurse	- Support children that need medical assistance		
	- Accompany students to the hospital in case of need	1	2 000,00€
	- Provide health education		
Food service management	- Provide lunch for students		
	- Have a bar prepared with snack for students		
	- Manage the menus for each week		External company
	- Manage the food ingredients and supplies		
Maintenance and cleaning	- Facilities maintenance		
	- Cleaning school facilities		External company
	- Contact external assistance in case of need		
IT management	- Provide IT assistance to the whole school	1	2 500,00€
Education assistants	- Supervise children during recess		
	- Provide assistance to students		
	- Help teachers if they need any materials	1/80 students	1 750,00€
	- Supervise the use of the rooms when students are studying or working on projects		

Source: Author

*Business Plan  
Implementation of a school from 1<sup>st</sup> to 12<sup>th</sup> grade with integrated arts and sports programs*

## Annex 27 – Turnover of Academia Geração

Profit & Loss	0	1	2	3	4	5	6	7	8	9	10
<b>Turnover</b>	<b>1 408 360,00</b>	<b>1 727 635,20</b>	<b>2 059 118,06</b>	<b>2 417 177,13</b>	<b>2 788 734,92</b>	<b>3 174 188,15</b>	<b>3 588 809,35</b>	<b>4 018 745,73</b>	<b>4 464 444,04</b>	<b>4 553 732,92</b>	
Tuition Fees	807 840,00	1 042 113,60	1 285 435,01	1 550 679,58	1 826 019,76	2 111 753,27	2 421 564,53	2 742 923,53	3 076 168,27	3 137 691,64	
# students	160	200	240	280	320	360	400	440	480	480	
Average Tuition Fee/student	5 049,00	5 210,57	5 355,98	5 538,14	5 706,31	5 865,98	6 053,91	6 233,92	6 408,68	6 536,86	
1st Cycle	807 840,00	823 996,80	840 476,74	857 286,27	874 432,00	891 920,64	909 759,05	927 954,23	946 513,31	965 443,58	
# students	160	160	160	160	160	160	160	160	160	160	
Average Tuition Fee/student	5 049,00	5 149,98	5 252,98	5 358,04	5 465,20	5 574,50	5 685,99	5 799,71	5 915,71	6 034,02	
2nd Cycle	0,00	218 116,80	444 958,27	453 857,44	462 934,59	472 193,28	481 637,14	491 269,89	501 095,28	511 117,19	
# students	0	40	80	80	80	80	80	80	80	80	
Average Tuition Fee/student		5 452,92	5 561,98	5 673,22	5 786,68	5 902,42	6 020,46	6 140,87	6 263,69	6 388,96	
3rd Cycle	0,00	0,00	0,00	239 535,87	488 653,17	747 639,36	762 592,14	777 843,99	793 400,87	809 268,88	
# students	0	0	0	40	80	120	120	120	120	120	
Average Tuition Fee/student				5 988,40	6 108,16	6 230,33	6 354,93	6 482,03	6 611,67	6 743,91	
Secondary	0,00	0,00	0,00	0,00	0,00	0,00	267 576,19	545 855,43	835 158,81	851 861,98	
# students	0	0	0	0	0	0	40	80	120	120	
Average Tuition Fee/student							6 689,40	6 823,19	6 959,66	7 098,85	
Enrollment Fee	36 000,00	45 900,00	56 181,60	66 856,10	77 935,12	89 430,55	101 354,62	113 719,88	126 539,21	129 070,00	
#students		144	180	216	252	288	324	360	396	432	432
Fee/student	250,00	250,00	250,00	250,00	250,00	250,00	250,00	250,00	250,00	250,00	250,00
Corporate Grants	93 760,00	120 890,40	149 068,51	179 726,19	211 550,54	244 575,98	280 324,35	317 404,82	355 856,39	362 973,51	
# students	16	20	24	28	32	36	40	44	48	48	
Average Tuition Fee/student	5 860,00	6 044,52	6 211,19	6 418,79	6 610,95	6 793,78	7 008,11	7 213,75	7 413,67	7 561,95	
1st cycle	93 760,00	95 635,20	97 547,90	99 498,86	101 488,84	103 518,62	105 588,99	107 700,77	109 854,78	112 051,88	
#students benefiting	16	16	16	16	16	16	16	16	16	16	
Average Contribution/student	5 860,00	5 977,20	6 096,74	6 218,68	6 343,05	6 469,91	6 599,31	6 731,30	6 865,92	7 003,24	
2nd cycle	0,00	25 255,20	51 520,61	52 551,02	53 602,04	54 674,08	55 767,56	56 882,91	58 020,57	59 180,98	
#students benefiting	0	4	8	8	8	8	8	8	8	8	
Average Contribution/student		6 313,80	6 440,08	6 568,88	6 700,26	6 834,26	6 970,95	7 110,36	7 252,57	7 397,62	
3rd cycle	0,00	0,00	0,00	27 676,30	56 459,66	86 383,28	88 110,95	89 873,17	91 670,63	93 504,04	
#students benefiting	0	0	0	4	8	12	12	12	12	12	
Average Contribution/student				6 919,08	7 057,46	7 198,61	7 342,58	7 489,43	7 639,22	7 792,00	
Secondary	0,00	0,00	0,00	0,00	0,00	0,00	30 856,85	62 947,97	96 310,40	98 236,61	
#students benefiting	0	0	0	0	0	0	4	8	12	12	
Average Contribution/student							7 714,21	7 868,50	8 025,87	8 186,38	
Rents	9 600,00	9 792,00	9 987,84	10 187,60	10 391,35	10 599,18	10 811,16	11 027,38	11 247,93	11 472,89	
Cafeteria/Bar	500,00	6 000,00	6 120,00	6 242,40	6 367,25	6 494,59	6 624,48	6 756,97	6 892,11	7 029,96	7 170,56
Stationery Shop	300,00	3 600,00	3 672,00	3 745,44	3 820,35	3 896,76	3 974,69	4 054,18	4 135,27	4 217,97	4 302,33
Space rental	309 960,00	316 159,20	322 482,38	328 932,03	335 510,67	342 220,89	349 065,30	356 046,61	363 167,54	370 430,89	
Gym 1	45	30,00	58 320,00	59 486,40	60 676,13	61 889,65	63 127,44	64 389,99	65 677,79	66 991,35	68 331,18
Gym 2	45	30,00	58 320,00	59 486,40	60 676,13	61 889,65	63 127,44	64 389,99	65 677,79	66 991,35	68 331,18
Theater	45	70,00	90 720,00	92 534,40	94 385,09	96 272,79	98 198,25	100 162,21	102 165,45	104 208,76	106 292,94
Outside sports field	45	15,00	29 160,00	29 743,20	30 338,06	30 944,83	31 563,72	32 195,00	32 838,90	33 495,67	34 165,59
Dance room 1	45	20,00	25 920,00	26 438,40	26 967,17	27 506,51	28 056,64	28 617,77	29 190,13	29 773,93	30 369,41
Dance room 2	45	20,00	25 920,00	26 438,40	26 967,17	27 506,51	28 056,64	28 617,77	29 190,13	29 773,93	30 369,41
Classrooms	45	20,00	21 600,00	22 032,00	22 472,64	22 922,09	23 380,53	23 848,15	24 325,11	24 811,61	25 307,84
School camps	144 000,00	183 600,00	224 726,40	267 424,42	311 740,46	357 722,18	405 418,47	454 879,52	506 156,85	516 279,99	
#students	160	200	240	280	320	360	400	440	480	480	
Fee/week	150,00	900,00	918,00	936,36	955,09	974,19	993,67	1 013,55	1 033,82	1 054,49	1 075,58
Uniforms	7 200,00	9 180,00	11 236,32	13 371,22	15 587,02	17 886,11	20 270,92	22 743,98	25 307,84	25 814,00	
# Students Medium/High Income		144	180	216	252	288	324	360	396	432	432
Price per student	50,00	50,00	51,00	52,02	53,06	54,12	55,20	56,31	57,43	58,58	59,75

Source: Author

*Business Plan*  
*Implementation of a school from 1<sup>st</sup> to 12<sup>th</sup> grade with integrated arts and sports programs*

## Annex 28 – Operating costs

Profit & Loss	0	1	2	3	4	5	6	7	8	9	10
<b>Operating Costs</b>	<b>960 429,80</b>	<b>1 108 116,85</b>	<b>1 150 658,40</b>	<b>1 277 216,65</b>	<b>1 330 463,20</b>	<b>1 481 388,24</b>	<b>1 564 813,91</b>	<b>1 690 992,98</b>	<b>1 761 843,23</b>	<b>1 796 851,72</b>	
<b>Teachers</b>	<b>357 600,00</b>	<b>439 008,00</b>	<b>466 515,36</b>	<b>523 387,79</b>	<b>559 833,91</b>	<b>637 275,44</b>	<b>701 824,42</b>	<b>750 321,48</b>	<b>800 477,69</b>	<b>816 487,24</b>	
Base Curriculum	268 800,00	283 968,00	289 647,36	310 721,70	316 936,14	323 274,86	343 254,31	350 119,39	357 121,78	364 264,21	
Common subjects	40 800,00	85 680,00	87 393,60	91 688,37	93 522,14	135 139,49	137 842,28	140 599,13	143 411,11	146 279,33	
Optional subjects	0,00	2 040,00	2 080,80	6 367,25	6 494,59	6 624,48	11 261,62	11 486,86	11 716,59	11 950,93	
Special classes	48 000,00	67 320,00	87 393,60	114 610,46	142 881,05	172 236,61	209 466,21	248 116,10	288 228,21	293 992,77	
<b>Other Staff</b>	<b>387 000,00</b>	<b>446 760,00</b>	<b>455 695,20</b>	<b>518 930,71</b>	<b>529 309,33</b>	<b>596 203,63</b>	<b>608 127,71</b>	<b>678 873,23</b>	<b>692 450,69</b>	<b>706 299,71</b>	
Principal	54 000,00	55 080,00	56 181,60	57 305,23	58 451,34	59 620,36	60 812,77	62 029,03	63 269,61	64 535,00	
# people	1	1	1	1	1	1	1	1	1	1	
cost/person	4500,00	4 590,00	4 681,80	4 775,44	4 870,94	4 968,36	5 067,73	5 169,09	5 272,47	5 377,92	
Counselors	60 000,00	91 800,00	93 636,00	127 344,96	129 891,86	165 612,12	168 924,36	206 763,42	210 899,69	215 116,66	
students/counselors	80										
# people	2	3	3	4	4	5	5	6	6	6	
cost/person	2500,00	2 550,00	2 601,00	2 653,02	2 706,08	2 760,20	2 815,41	2 871,71	2 929,15	2 987,73	
Logistics manager	30 000,00	30 600,00	31 212,00	31 836,24	32 472,96	33 122,42	33 784,87	34 460,57	35 149,78	35 852,78	
# people	1	1	1	1	1	1	1	1	1	1	
cost/person	2500,00	2 550,00	2 601,00	2 653,02	2 706,08	2 760,20	2 815,41	2 871,71	2 929,15	2 987,73	
IT manager	30 000,00	30 600,00	31 212,00	31 836,24	32 472,96	33 122,42	33 784,87	34 460,57	35 149,78	35 852,78	
# people	1	1	1	1	1	1	1	1	1	1	
cost/person	2500,00	2 550,00	2 601,00	2 653,02	2 706,08	2 760,20	2 815,41	2 871,71	2 929,15	2 987,73	
Nurse	24 000,00	24 480,00	24 969,60	25 468,99	25 978,37	26 497,94	27 027,90	27 568,46	28 119,83	28 682,22	
# people	1	1	1	1	1	1	1	1	1	1	
cost/person	2000,00	2 040,00	2 080,80	2 122,42	2 164,86	2 208,16	2 252,32	2 297,37	2 343,32	2 390,19	
Receptionist	18 000,00	18 360,00	18 727,20	19 101,74	19 483,78	19 873,45	20 270,92	20 676,34	21 089,87	21 511,67	
# people	1	1	1	1	1	1	1	1	1	1	
cost/person	1500,00	1 530,00	1 560,60	1 591,81	1 623,65	1 656,12	1 689,24	1 723,03	1 757,49	1 792,64	
Education assistants	42 000,00	64 260,00	65 545,20	89 141,47	90 924,30	115 928,48	118 247,05	144 734,39	147 629,08	150 581,66	
students/educational assistant	80										
# people	2	3	3	4	4	5	5	6	6	6	
cost/person	1750,00	1 785,00	1 820,70	1 857,11	1 894,26	1 932,14	1 970,78	2 010,20	2 050,40	2 091,41	
Librarian	21 000,00	21 420,00	21 848,40	22 285,37	22 731,08	23 185,70	23 649,41	24 122,40	24 604,85	25 096,94	
# people	1	1	1	1	1	1	1	1	1	1	
cost/person	1750,00	1 785,00	1 820,70	1 857,11	1 894,26	1 932,14	1 970,78	2 010,20	2 050,40	2 091,41	
Financial manager	36 000,00	36 720,00	37 454,40	38 203,49	38 967,56	39 746,91	40 541,85	41 352,68	42 179,74	43 023,33	
# people	1	1	1	1	1	1	1	1	1	1	
cost/person	3000,00	3 060,00	3 121,20	3 183,62	3 247,30	3 312,24	3 378,49	3 446,06	3 514,98	3 585,28	
HR manager	36 000,00	36 720,00	37 454,40	38 203,49	38 967,56	39 746,91	40 541,85	41 352,68	42 179,74	43 023,33	
# people	1	1	1	1	1	1	1	1	1	1	
cost/person	3000,00	3 060,00	3 121,20	3 183,62	3 247,30	3 312,24	3 378,49	3 446,06	3 514,98	3 585,28	
PR manager	36 000,00	36 720,00	37 454,40	38 203,49	38 967,56	39 746,91	40 541,85	41 352,68	42 179,74	43 023,33	
# people	1	1	1	1	1	1	1	1	1	1	
cost/person	3000,00	3 060,00	3 121,20	3 183,62	3 247,30	3 312,24	3 378,49	3 446,06	3 514,98	3 585,28	
<b>Administrative Costs</b>	<b>215 829,80</b>	<b>222 348,85</b>	<b>228 447,84</b>	<b>234 898,15</b>	<b>241 319,96</b>	<b>247 909,16</b>	<b>254 861,78</b>	<b>261 798,27</b>	<b>268 914,85</b>	<b>274 064,77</b>	
Maintenance											
% of total revenue	5%	70 418,00	71 826,36	73 262,89	74 728,14	76 222,71	77 747,16	79 302,11	80 888,15	82 505,91	84 156,03
Marketing and communications											
% of total revenue	1%	14 083,60	14 365,27	14 652,58	14 945,63	15 244,54	15 549,43	15 860,42	16 177,63	16 501,18	16 831,21
Software	1000,00	1 000,00	1 020,00	1 040,40	1 061,21	1 082,43	1 104,08	1 126,16	1 148,69	1 171,66	1 195,09
Uniform											
Cost/student	7 200,00	9 180,00	11 236,32	13 371,22	15 587,02	17 886,11	20 270,92	22 743,98	25 307,84	28 814,00	
Margin	45 10%	45,00	45,90	46,82	47,75	48,71	49,68	50,68	51,69	52,72	53,78
Utilities											
% of total revenue	3%	42 250,80	43 095,82	43 957,73	44 836,89	45 733,62	46 648,30	47 581,26	48 532,89	49 503,55	50 493,62
Legal Costs & Taxes											
Real Estate Tax	0,3%	10 459,40	11 035,04	11 035,04	11 226,92	11 226,92	11 226,92	11 418,80	11 418,80	11 418,80	11 418,80
Other legal costs & taxes		5 459,40	6 035,04	6 035,04	6 226,92	6 226,92	6 226,92	6 418,80	6 418,80	6 418,80	6 418,80
		5 000,00	5 000,00	5 000,00	5 000,00	5 000,00	5 000,00	5 000,00	5 000,00	5 000,00	5 000,00
School supplies											
% of total revenue	5%	70 418,00	71 826,36	73 262,89	74 728,14	76 222,71	77 747,16	79 302,11	80 888,15	82 505,91	84 156,03

Source: Author

*Business Plan*  
*Implementation of a school from 1<sup>st</sup> to 12<sup>th</sup> grade with integrated arts and sports programs*

## Annex 29 – CAPEX and Fixed Assets

Year	0	1	2	3	4	5	6	7	8	9	10
<b>CAPEX</b>	<b>1 985 283,60</b>	<b>282 720,00</b>	<b>0,00</b>	<b>94 240,00</b>	<b>0,00</b>	<b>0,00</b>	<b>94 240,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>	<b>0,00</b>
Property	1 500 000,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Area	1300										
€/m2	1153,85										
Construction & Fit Out	384 800,00	230 880,00	0,00	76 960,00	0,00	0,00	76 960,00	0,00	0,00	0,00	0,00
Construction	319 800,00	191 880,00	0,00	63 960,00	0,00	0,00	63 960,00	0,00	0,00	0,00	0,00
€/m2	492,00										
Furniture	65 000,00	39 000,00	0,00	13 000,00	0,00	0,00	13 000,00	0,00	0,00	0,00	0,00
€/m2	100,00										
IT Equipment	86 400,00	51 840,00	0,00	17 280,00	0,00	0,00	17 280,00	0,00	0,00	0,00	0,00
	172800,00										
Marketing & Communication	14 083,60										
	14 083,60										
Development phasing	0,50	0,30		0,10				0,10			
<b>Gross Fixed Assets</b>	<b>1 971 200,00</b>	<b>2 253 920,00</b>	<b>2 253 920,00</b>	<b>2 348 160,00</b>	<b>2 348 160,00</b>	<b>2 348 160,00</b>	<b>2 442 400,00</b>	<b>2 442 400,00</b>	<b>2 442 400,00</b>	<b>2 442 400,00</b>	<b>2 442 400,00</b>
Property	1 500 000,00	1 500 000,00	1 500 000,00	1 500 000,00	1 500 000,00	1 500 000,00	1 500 000,00	1 500 000,00	1 500 000,00	1 500 000,00	1 500 000,00
Construction	319 800,00	511 680,00	511 680,00	575 640,00	575 640,00	575 640,00	639 600,00	639 600,00	639 600,00	639 600,00	639 600,00
Phase 1	319 800,00										
Phase 2		191 880,00									
Phase 3				63 960,00							
Phase 4							63 960,00				
Furniture	65 000,00	104 000,00	104 000,00	117 000,00	117 000,00	117 000,00	130 000,00	130 000,00	130 000,00	130 000,00	130 000,00
Phase 1	65 000,00										
Phase 2		39 000,00									
Phase 3				13 000,00							
Phase 4							13 000,00				
IT Equipment	86 400,00	138 240,00	138 240,00	155 520,00	155 520,00	155 520,00	172 800,00	172 800,00	172 800,00	172 800,00	172 800,00
Phase 1	86 400,00										
Phase 2		51 840,00									
Phase 3				17 280,00							
Phase 4							17 280,00				
<b>Depreciations</b>	<b>0,00</b>	<b>102 460,00</b>	<b>133 936,00</b>	<b>133 936,00</b>	<b>115 628,00</b>	<b>98 348,00</b>	<b>85 348,00</b>	<b>82 280,00</b>	<b>82 280,00</b>	<b>79 680,00</b>	<b>73 920,00</b>
Property	Asset life time	30	50 000,00	50 000,00	50 000,00	50 000,00	50 000,00	50 000,00	50 000,00	50 000,00	50 000,00
Construction	30	10 660,00	17 056,00	17 056,00	19 188,00	19 188,00	19 188,00	21 320,00	21 320,00	21 320,00	21 320,00
Phase 1		10 660,00	10 660,00	10 660,00	10 660,00	10 660,00	10 660,00	10 660,00	10 660,00	10 660,00	10 660,00
Phase 2			6 396,00	6 396,00	6 396,00	6 396,00	6 396,00	6 396,00	6 396,00	6 396,00	6 396,00
Phase 3					2 132,00	2 132,00	2 132,00	2 132,00	2 132,00	2 132,00	2 132,00
Phase 4							2 132,00	2 132,00	2 132,00	2 132,00	2 132,00
Furniture	5	13 000,00	20 800,00	20 800,00	23 400,00	23 400,00	10 400,00	5 200,00	5 200,00	2 600,00	2 600,00
Phase 1		13 000,00	13 000,00	13 000,00	13 000,00	13 000,00					
Phase 2			7 800,00	7 800,00	7 800,00	7 800,00	7 800,00				
Phase 3					2 600,00	2 600,00	2 600,00	2 600,00	2 600,00		
Phase 4										2 600,00	2 600,00
IT Equipment	3	28 800,00	46 080,00	46 080,00	23 040,00	5 760,00	5 760,00	5 760,00	5 760,00	5 760,00	0,00
Phase 1		28 800,00	28 800,00	28 800,00							
Phase 2			17 280,00	17 280,00	17 280,00	5 760,00	5 760,00				
Phase 3											
Phase 4											
<b>Net Fixed Assets</b>	<b>1 811 140,00</b>	<b>1 954 164,00</b>	<b>1 866 308,00</b>	<b>1 850 680,00</b>	<b>1 758 092,00</b>	<b>1 678 504,00</b>	<b>1 678 944,00</b>	<b>1 602 424,00</b>	<b>1 528 504,00</b>	<b>1 454 584,00</b>	<b>1 380 664,00</b>
Property	1 450 000,00	1 400 000,00	1 350 000,00	1 300 000,00	1 250 000,00	1 200 000,00	1 150 000,00	1 100 000,00	1 050 000,00	1 000 000,00	950 000,00
Construction	309 140,00	483 964,00	466 908,00	511 680,00	492 492,00	473 304,00	515 944,00	494 624,00	473 304,00	451 984,00	430 664,00
Furniture	52 000,00	70 200,00	49 400,00	39 000,00	15 600,00	5 200,00	13 000,00	7 800,00	5 200,00	2 600,00	0,00
IT Equipment	57 600,00	63 360,00	17 280,00	11 520,00	5 760,00	0,00	11 520,00	5 760,00	0,00	0,00	0,00

Source: Author

## Annex 30 – Financial costs from scenario 2 with 45% investment and 55% loan

Financial costs		38 217	37 102	34 873	32 643	30 414	28 185	25 956	23 726	21 497	19 268
<b>EBT</b>		<b>307 253,49</b>	<b>448 480,30</b>	<b>739 650,91</b>	<b>994 689,04</b>	<b>1 329 509,59</b>	<b>1 579 267,09</b>	<b>1 915 759,93</b>	<b>2 221 746,54</b>	<b>2 601 423,91</b>	<b>2 663 693,61</b>
		21,8%	26,0%	35,3%	41,0%	47,7%	49,8%	53,4%	55,3%	58,3%	58,5%
Corporate Tax	22,50%	69 132,04	100 908,07	166 421,46	223 130,03	299 139,66	355 335,09	431 045,98	499 892,97	585 320,38	599 331,06
<b>Net Profit</b>		<b>238 121,46</b>	<b>347 572,23</b>	<b>573 229,46</b>	<b>768 559,01</b>	<b>1 030 369,93</b>	<b>1 223 931,99</b>	<b>1 484 713,95</b>	<b>1 721 853,57</b>	<b>2 016 103,53</b>	<b>2 064 362,54</b>
		16,9%	20,1%	27,8%	31,8%	36,9%	38,6%	41,4%	42,8%	45,2%	45,3%

Source: Author