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THEORETICAL CONCEPTUALIZATION OF THE NOTION OF «MONITORING» IN THE QUALITY ASSURANCE SYSTEM OF HIGHER EDUCATION

Abstract. The article provides a thorough theoretical analysis of the essence and content of the definition of «monitoring», emphasizing the need to understand this phenomenon as a necessary tool for ensuring the quality of higher education. The main approaches to the interpretation of this concept in the modern scientific literature are considered, which allowed to identify the key characteristics of monitoring, in particular: systematic, continuous, analytical and effective. It is found that monitoring ensures continuous observation of a phenomenon or process, and allows identifying deviations from the planned results and responding to them in a timely manner. The functional purpose of monitoring as an important tool of educational management is outlined, among the functions of which are: control over the correspondence between planned and actual results, tracking the dynamics of changes in educational processes, identifying deviations and responding by initiating corrective measures. The emphasis is placed on the need for a clear and unambiguous understanding of the concept of «monitoring» as a prerequisite for the effective implementation of evaluation procedures and improving the quality of the educational process, which is an integral part of the strategic management of higher education. As a result of the study, the author proposes a definition of monitoring as a holistic, systematic process of collecting, analyzing and evaluating data, which contributes to making informed management decisions to achieve the planned educational goals. It is emphasized that the clarification of the conceptual apparatus within the framework of the studied issues ensures the conceptual integrity and scientific validity of further theoretical and methodological research, contributes to the formation of a coherent terminological framework necessary for the development of effective mechanisms for managing the quality of higher education, a comprehensive analysis of the state of the educational system and its forecasting in the context of dynamic transformations, modern challenges and potential educational risks and threats.

Keywords: monitoring, quality of higher education, monitoring of higher education quality, quality assurance system of higher education.



ТЕОРЕТИЧНЕ ОСМИСЛЕННЯ ПОНЯТТЯ «МОНІТОРИНГ» У СИСТЕМІ ЗАБЕЗПЕЧЕННЯ ЯКОСТІ ВИЩОЇ ОСВІТИ

Анотація. У статті проведено ґрунтовний теоретичний аналіз сутності та змісту дефініції «моніторинг», зауважено на необхідності осмислення цього феномену як необхідного інструмента забезпечення якості вищої освіти. Розглянуто основні підходи до трактування означеного поняття в сучасній науковій літературі, що дозволило виокремити ключові характеристики моніторингу, зокрема: систематичність, безперервність, аналітичність і результативність. З'ясовано, що моніторинг забезпечує безперервне спостереження за якимось явищем або процесом, дозволяє виявляти відхилення від запланованих результатів та своєчасно на них реагувати. Окреслено функціональне призначення моніторингу як важливого інструмента освітнього менеджменту, серед функцій якого визначено: контроль за відповідністю між запланованими та фактичними результатами, відстеження динаміки змін в освітніх процесах, виявлення відхилень і реагування шляхом ініціювання коригувальних заходів. Зроблено акцент на необхідності чіткого й однозначного розуміння поняття «моніторинг» як передумови ефективного впровадження процедур оцінювання й підвищення якості освітнього процесу, що є невід'ємним складником стратегічного управління вищою освітою. У результаті проведеного дослідження запропоновано авторське визначення дефініції моніторингу як цілісного, систематичного процесу збирання, аналізу та оцінювання даних, що сприяє прийняттю обґрунтованих управлінських рішень задля досягнення запланованих освітніх цілей. Акцентовано, що уточнення понятійного апарату в межах досліджуваної проблематики забезпечує концептуальну цілісність і наукову обґрунтованість подальших теоретико-методологічних пошуків, сприяє формуванню узгодженої термінологічної бази, необхідної для розроблення дієвих механізмів управління якістю вищої освіти, комплексного аналізу стану освітньої системи та здійснення її прогнозування в умовах динамічних трансформацій, сучасних викликів і потенційних освітніх ризиків й загроз.

Ключові слова: моніторинг, якість вищої освіти, моніторинг якості вищої освіти, система забезпечення якості вищої освіти.

INTRODUCTION

The problem formulation. In today's context of higher education transformation, driven by globalization, digitalization and integration into the European education area, as well as the need to ensure the competitiveness of graduates in the global labor market, the issue of ensuring the quality of educational services is becoming a priority. The quality of education is seen not only as a result but also as a dynamic process that requires constant monitoring, analysis and improvement. The effective functioning of the system of internal and external quality assurance requires scientifically based approaches to diagnosing, evaluating and forecasting the dynamics of the educational environment, which is made possible by systemic monitoring. In this context, monitoring is a multidimensional system of collecting, processing, analyzing and interpreting data on the state and dynamics of the educational process. In this regard, the concept of «monitoring» is gaining particular relevance as a key tool for managing the quality of higher education.

Despite the widespread use of the term «monitoring» in domestic and foreign scientific discourse, there is a lack of unity in its interpretation, which necessitates a deeper theoretical understanding of this phenomenon in the context of ensuring the quality of education. Of particular importance is the analysis of the essential characteristics, functional purpose and structural and content components of monitoring as a systemic process aimed at maintaining and improving the standards of educational activities.

Analysis of scientific research. The analysis of the theoretical and methodological foundations of monitoring in the education system shows that the problem of ensuring the quality of educational processes through monitoring support mechanisms is the subject of close attention of a wide range of researchers. Several key areas of research on this issue have emerged in the scientific discourse. In particular, general theoretical approaches to the essence of monitoring, its functional purpose, tools and methodological foundations are analyzed in the works of I. Annenkova, V. Bazeliuk, O. Bainazarova, I. Bulakh, D. Bodnenko, I. Hyrylovska, A. Denysova, H. Yelnykova, O. Zhylytsov, V. Zinchenko, M. Kichula, H. Krasylukova, S. Kretovych, O. Leshchynskyi, O. Lokshyna, T. Lukina, O. Liashenko, N. Mazur, M. Mruha, V. Rakcheieva, T. Khlebnikova, and L. Shchogoleva. Their research defines monitoring as a multidimensional phenomenon that includes not only tracking results, but also diagnosing the dynamics of educational change, managerial reflection, feedback in the educational process.

The issues of formation and evolution of the system of monitoring the quality of education in the context of the transformation of the educational space are covered in the works of S. Hubar, N. Denysova, A. Yermol, I. Ivaniuk, L. Kalinina, M. Kichula, O. Lokshyna, T. Lukina, O. Liashenko, O. Mayorov, M. Martynenko, O. Ovcharuk, N. Radko. The researchers emphasize the need for systematic implementation of monitoring procedures in the context of national and European requirements for quality assurance in education.

The managerial aspect of monitoring, in particular its role as a tool for strategic decision-making, is revealed in the scientific works of I. Bulakh, N. Verbytska, V. Horb, H. Dmytrenko, H. Yelnykova, I. Kapustin, O. Kasyanova, I. Likarchuk, I. Makarenko, N. Nikitina, O. Shestopaliuk. These authors focus on the effectiveness of management interaction, quality monitoring support at the level of educational institutions, and strategic planning for the development of educational systems.

Practical approaches to the organization of monitoring the quality of education, including mechanisms for collecting, analyzing and interpreting educational data, have been studied by N. Baidatska, O. Bilyk, V. Horb, L. Korobovych, I. Lapshyna, I. Makarenko, V. Prykhodko, Y. Romanenko, Z. Riabova, L. Tarasiuk. Their work is aimed at forming



an effective methodological framework for the implementation of monitoring activities in the modern educational environment.

Based on the results of previous scientific research, the author of the article analyzes certain aspects of monitoring as an integral component of the education quality assurance system. In the course of the research, the author outlines the conceptual foundations of monitoring, which include key provisions on the goals of education, the content of the concept of quality of education and the role of monitoring processes in ensuring it. In addition, models and types of monitoring studies, principles and functions of their organization, as well as levels of their functioning are analyzed (Ilichuk, 2021).

AIM AND TASKS RESEARCH

The purpose of the article is to provide a theoretical understanding of the definition of «monitoring» in the context of modern approaches to ensuring the quality of higher education, to clarify its content characteristics, functional aspects and significance as a tool for managing the quality of the educational process in the context of the transformation of the educational environment.

RESEARCH METHODS

The methodological basis of the study is a set of interrelated general scientific and special methods that provide a holistic theoretical understanding of the phenomenon of monitoring in the context of quality assurance in higher education. In the framework of the research, the following methods were used: analysis, synthesis, abstraction, induction, deduction, generalization – for processing and critical comprehension of scientific sources on the problem of monitoring and its impact on the quality of education; terminological and definitional analysis – to clarify the conceptual and categorical apparatus of the study, in particular, structuring and interpretation of the definition of «monitoring» in the national scientific discourse; comparative and contrastive method – to identify the variability of approaches to understanding the essence of monitoring in the context of quality management in education from different scientific perspectives; and logical-semantic analysis – to determine the content and structural characteristics of monitoring activities as a tool for diagnosing and assessing the quality of the educational process in higher education institutions.

RESULTS OF THE RESEARCH

Monitoring is emerging as a key tool for studying the functioning of educational systems and is an integral element of the mechanisms for ensuring the quality of education. In this regard, there is a need for a clear definition of the conceptual framework within the scope of the study, which will allow to systematize key terms, define their content characteristics and interrelationships, as well as ensure the conceptual integrity and scientific validity of further theoretical and methodological research. Clarification of the conceptual field is a prerequisite for the development of effective monitoring mechanisms that can not only provide a comprehensive analysis of the state of the higher education system, but also forecast it in the context of dynamic transformations, new challenges and potential educational risks.

The term «monitoring» appeared in the second half of the twentieth century, in soil science and ecology, where monitoring first became an object of scientific research. The concept of monitoring quickly spread to other areas of human activity, including medicine, economics, and sociology (Lokshyna, 2004).

Today, the concept of «monitoring» does not have a single and generally accepted definition in the scientific literature, due to its complexity and ambiguity. For a more detailed analysis of the content of this concept, let us turn to dictionaries, which serve as a tool that regulates the use of terms and language norms, and can also reflect the spread of terms in general or specialized lexical circulation, the level of development of thesauri of various scientific disciplines. In particular, the authors of the Dictionary of Foreign Language Words offer two definitions of monitoring: the first is a constant control over any process in order to determine its compliance with the desired result; the second is observation of the environment, assessment and forecast of its state in the context of the impact of human economic activity (Pustovit, Skopenko, Syuta, & Tsybalyuk, 2000, p. 652).

In the «Great Explanatory Dictionary of the Modern Ukrainian Language» this definition is clarified and defined as continuous monitoring of any process in order to identify its compliance with the desired result (Busel, 2001, p. 538). Consistent with this interpretation is the use of this concept in the sense of continuous monitoring of a process in order to determine its compliance with the desired result or preliminary assumptions, which is given in the «Great Universal Dictionary of the Ukrainian Language» (Zagoruyko, 2009, p. 287).

An appeal to the «Modern Dictionary of Foreign Language Words» showed that this definition is interpreted as: 1) constant monitoring of any process in order to determine whether it meets the desired result or initial forecasts; 2) observation of the environment, assessment and forecast of its condition in connection with human economic activity; 3) collection of information to study public opinion on an issue (Skopenko, & Tsybalyuk, 2006, p. 464).

Taking into account the definitions given in the reference books, it is possible to distinguish the key semantic characteristics of the concept of «monitoring»: firstly, monitoring is a systematic process of observing an object, assessing its condition, controlling the development of events and preventing undesirable trends that may arise; secondly, monitoring is characterized by targeting and subject orientation, i.e. it is applied to specific objects and processes in order to solve specific problems. The concept of «monitoring» is included in the terminology systems of many fields of knowledge, while its content is quite diverse (Fig. 1).

In the context of our study, there is a need to analyze the content of this concept in pedagogy in order to use it effectively in educational practice. Thus, conducting a comparative analysis of the concept of «monitoring», H. Krasnyukova notes that monitoring is a cyclical process that lasts in time, consists in obtaining the necessary information about the object as a whole or certain of its indicators through the use of empirical and theoretical research methods (observation,



analysis, surveys, etc.), which are selected depending on the object and intermediate goals of monitoring (studying the dynamics, preventing undesirable phenomena, forecasting, etc.) (Krasylnykova, 2015, p. 67).

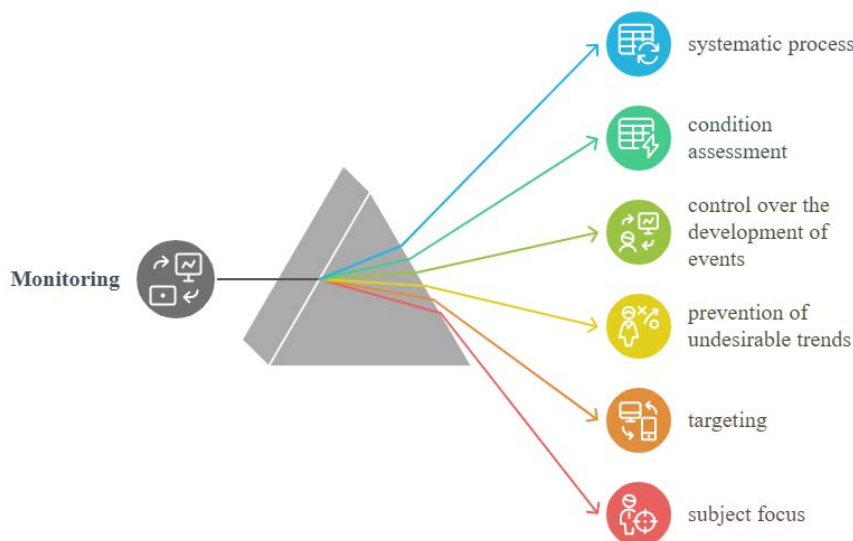


Fig. 1. Key semantic characteristics of the concept of «monitoring».

T. Lukina defines monitoring as a special system of collecting, processing, storing and disseminating data on the state of education, forecasting the dynamics and main trends of its development and developing scientifically based recommendations for making managerial decisions to improve the efficiency of the education sector (Lukina, 2008, p. 519). The researcher considers monitoring as a tool for managing the quality of education; as an information system; as a procedure for collecting data about an object (Lukina, 2007, p. 16).

The opinion of O. Lokshyna is in line with this one, who characterizes monitoring as a system of collecting, processing and disseminating information about the activities of the educational system, which ensures continuous monitoring of its state and forecasting its development (Lokshyna, 2004, p. 28). O. Liashenko somewhat complements this statement, considering monitoring as a system of measures for collecting, processing, analyzing and disseminating information in order to study and assess the state of functioning of a particular subject of educational activity and forecast its development based on the analysis of the data obtained and the identified trends and patterns (Liashenko, 2004, p. 22).

Summarizing the scientific research on the phenomenon of monitoring, O. Liashenko, T. Lukina, I. Bulakh, M. Mruha note that monitoring has several aspects that define it as a means of information support for management. Firstly, monitoring is a research process, and therefore it is characterized by a research methodology: determination of the purpose, subject and object, tasks, concept, hypothesis (as a predicted result), etc. Secondly, monitoring is a technological process of collecting, processing and disseminating information, which has tools, procedures and techniques specific to different methods of data processing. Thirdly, monitoring is a necessary component of management as a special type of activity, which has its own characteristics, such as simple constructivism. Fourthly, monitoring is a means of evaluation, which allows to draw conclusions and judgments aimed at the development of the object under study (Liashenko, Lukina, Bulakh, & Mruha, 2012, pp. 19-20).

G. Yelnykova notes that monitoring is a set of procedures for observation, ongoing assessment of the transformations of the managed object and the direction of these transformations to achieve the specified parameters of the object's development. The essence of the monitoring process lies in the synchronization of the processes of observation, measurement, development of new knowledge about the state of the object on this basis, followed by modeling, forecasting and making appropriate management decisions. In defining the specifics of educational monitoring, the researcher emphasizes that its functions are not limited to providing information about the state of the educational system, but are characterized by the inclusion of mechanisms of current regulation and self-regulation. Another characteristic feature of monitoring is that in the process of its implementation it is impossible to separate the management information system from the decision-making system (Yelnykova, 2002, p. 30).

T. Khlebnikova defines monitoring as a process of continuous scientifically based, diagnostic and prognostic monitoring of the state and development of a pedagogical object in order to optimally select educational goals, objectives and means of solving them (Khlebnikova, 2009, p. 15). I. Annenkova notes that monitoring is a form of organization, collection, storage, processing and dissemination of information about pedagogical systems, which ensures continuous monitoring of their condition, and also makes it possible to predict the development of pedagogical systems (Annenkova, 2016).

The position of the team of authors, including D. Bodnenko, O. Zhylytsov, O. Leshchynskyi, N. Mazur, is in line with the previous statements. N. Mazur, who define monitoring in education as a special system of collecting, processing, storing and disseminating information about the state of education, forecasting on the basis of objective data the dynamics and



main trends of its development and developing scientifically sound recommendations for making management decisions to improve the efficiency of the educational sector (Bodnenko, Zhiltsov, Leshchynskyi, & Mazur, p. 9).

Based on the structural and semantic analysis of the concept of «monitoring», I. Hyrylovska concludes that monitoring is a certain sequence of actions (procedure, process, event) that are filled with content (comparison, observation, evaluation), aimed at a specific object (system, elements of the educational system, pedagogical object) and determine the practical result (information, knowledge, judgment) used to achieve the ultimate goal (making managerial decisions to improve the quality of education, optimize the educational process). At the same time, the researcher, having identified such elements as goal, result, object, action, content in the phenomenon of «monitoring», explores its nature from the perspective of an activity-based approach (Hyrylovska, 2020, p. 49).

A. Vasyliuk, & M. Day notes that monitoring is a complex pedagogical phenomenon that can be characterized as both a system and a process. As a system, monitoring is a set of interrelated elements: the purpose of its conduct, the object of monitoring, the subjects of organization and implementation of monitoring, a set of criteria and indicators of evaluation, methods of collecting information, while acting as a subsystem of education management. The goal is the backbone element of monitoring as an activity system, permeating all its elements: based on the goal, a set of criteria and indicators for assessing the quality of education is determined, study methods are selected, and a monitoring procedure is built (Vasyliuk & Day, p. 152).

M. Kichula, having studied the evolution of the concept of «monitoring», includes the structure of this definition: 1) observation and warning; 2) an element of the management system; 3) a means of effective functioning of the forecasting system; 4) tracking, diagnostics, forecasting of performance results; 5) regular and systematic verification of the educational process according to certain criteria; 6) systematic collection of relevant information; 7) forecasting, evaluation and control. The author notes that monitoring has moved from simple observation and supervision to a system of measures, actions that are focused on collecting information, determining the purpose of this information for use in management activities (Kichula, 2012, p. 128).

A. Denysova identifies the directions of research on monitoring in pedagogy, among which are: the theoretical-analytical – monitoring is viewed as a method for studying the education system and its components using a wide range of quality criteria and indicators, diagnostic procedures, and methods; the informational – monitoring involves the collection, storage, processing, and/or structuring and dissemination of information about the functioning of the educational system and its components, which ensures continuous observation of its condition and forecasting of its development; the managerial – monitoring is used for the continuous provision of management with data that confirm or refute the presence of progress in achieving the expected program outcomes, for making appropriate managerial decisions (Denysova, 2022. p. 97).

The results of the study of scientific sources confirm the diversity in the content of the concept of «monitoring». It is obvious that we should focus on the fact that each definition reinforces one or another aspect of this phenomenon. Summarizing various scientific sources on this issue, we note that the pedagogical literature offers various definitions of the concept of «monitoring», which is most often understood as a long-term monitoring of the process of integration of psychological and pedagogical knowledge in all its states and manifestations, comparing the information received with a given standard and forecast; tracking the dynamics of the activity of the object of pedagogical management and the level of vital activity; analysis of the state of the object (system or complex phenomenon) through periodic or continuous repetition of data collection

The study of scientific works shows that some researchers equate monitoring in education with evaluation, control, diagnosis, and expertise. Based on the preliminary structural and semantic analysis of the studied scientific category, we believe that it is a mistake to equate monitoring as a multifunctional phenomenon with various processes and procedures of educational activities. An example of such an approach is the detailed comparative analysis of these concepts in the educational sphere by G. Krasylnykova. The researcher determines the status of each concept, namely: a) status of evaluation: control procedure; b) status of control: a component of the management cycle, a management function; c) status of diagnosis: control and evaluation of educational performance with additional functions of analysis and correction; d) status of examination: management technology of evaluation and control (Krasylnykova, 2015, p. 74).

In her scientific investigations, I. Annenkova identifies specific characteristics of monitoring that distinguish it from control and pedagogical expertise. The author notes that, unlike control, which is associated with the microelements of the educational system, monitoring is interconnected with the functioning of the entire system. Moreover, control is annually directed at new objects, while monitoring is periodically repeated and aimed at the same objects (Annenkova, 2016). A. Denysova adds that monitoring holds the status of research rather than solely empirical data collection, is characterized by a comprehensive and systematic nature, creates conditions for planning, and focuses on the key parameters of an educational institution (Denysova, 2022, p. 97).

T. Lukina points out that despite certain shared elements and the presence of control and assessment stages within the monitoring research cycle, the concepts of monitoring, evaluation, and control (as an administrative procedure) describe different processes and have distinct features that preclude their interchangeability. She emphasizes that monitoring is a means of obtaining, utilizing, and forecasting educational outcomes, whereas control is an evaluation of actual performance results at different time intervals. According to the researcher, monitoring and control (as inspection) differ in purpose and procedure, in the subject conducting the evaluation, in the form of result presentation, and in the method of using the evaluation outcomes (Lukina, 2006).

A similar position is held by L. Shchogoleva, who stresses that educational monitoring is a systematic procedure whose goal is not only to track the condition of a particular object but also to identify factors necessary for its development and



change. It is one of the scientific methods for researching a specific object. She notes that monitoring provides high-quality and timely information essential for managerial decision-making. Monitoring procedures are linked to standards against which the obtained results are compared, which, in turn, requires a clear definition of parameters, criteria, and desired outcomes. Control, by contrast, is the assessment of actual results at various points in time. It fulfills an administrative function and is intended to establish whether the stages, steps, or achieved outcomes correspond to certain norms and requirements, issuing a verdict accordingly. As an action, control is one of the methods within the monitoring study. On the other hand, control (as a function) utilizes monitoring as an innovative tool for quality management in educational institutions (Shchogoleva, 2014, p. 38).

In our view, the concepts of «monitoring», «evaluation», «control», «diagnostics» and «expertise» are related but not identical. We share the views of researchers such as S. Kretovych (2012), O. Bainazarova, V. Rakcheeva (2009), I. Hrylovska (2020) and V. Zinchenko (2013), who believe that monitoring is broader than control, as it includes the procedure of «evaluation». Pedagogical diagnostics is closely aligned with monitoring due to its analytical and prognostic functions. Control and diagnostics are components of educational monitoring, which enables strategic management of both educational institutions and the education system as a whole. Our position aligns with scholars who view diagnostics, evaluation, forecasting, and designing as integral components of educational monitoring.

The analysis of scientific research has enabled us to propose our own definition of «monitoring» as a systematic process of collecting, analyzing, and evaluating data with the aim of control, tracking changes, and making decisions to achieve set goals. Monitoring ensures continuous observation of a phenomenon or process, allows for the identification of deviations from planned outcomes, and facilitates timely responses. Based on this conclusion, we define the main characteristics and functions of monitoring in the context of quality assurance in higher education (Fig. 2).

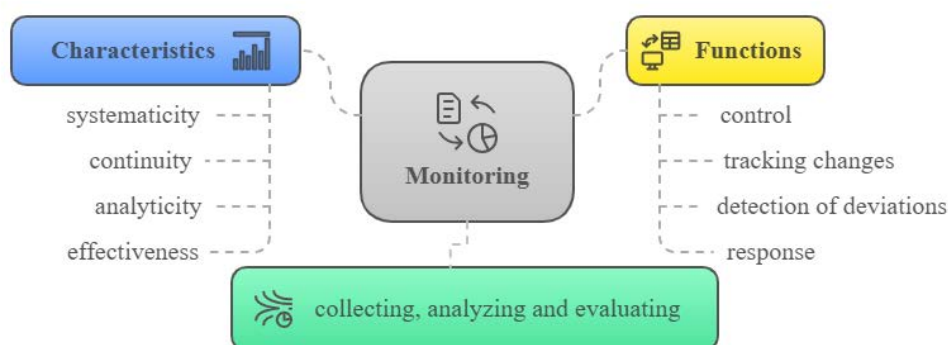


Fig. 2. Key characteristics and functions of monitoring in the quality assurance system of higher education.

Thus, educational quality monitoring is a comprehensive tool that combines systematic observation, data analysis, and support for managerial decision-making. Its characteristics and functions ensure effective control and improvement of the educational process, contributing to the achievement of high standards of higher education quality.

CONCLUSIONS AND PROSPECTS OF FURTHER RESEARCH

The conducted study has deepened the understanding of monitoring as an integral element of the higher education quality assurance system, emphasizing its role in achieving educational goals. Based on the analysis of academic research, monitoring is identified as a key tool that ensures systematic data collection, analysis, and evaluation for control, tracking changes, and informed decision-making. Monitoring is defined as a systematic and continuous process aimed at observing educational processes, detecting deviations from planned outcomes, and responding to them in a timely manner. The core characteristics of monitoring – systematicity, continuity, analytical orientation, and effectiveness – have been identified, as well as its key functions, including control, change tracking, deviation detection, and responsive action. The proposed definition and structured framework of monitoring characteristics and functions provide a theoretical foundation for the further improvement of the higher education quality assurance system, enhancing the effectiveness of educational processes and supporting the strategic objectives of higher education institutions.

Future research should focus on summarizing best international practices in higher education quality monitoring, aiming to adapt effective approaches to the Ukrainian educational context. It is also important to explore the interrelation between internal and external quality assurance systems in the context of monitoring activities, particularly through the lens of institutional autonomy in higher education.

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