STAIRS

Stakeholders together adapting ideas to readjust local systems to promote inclusive education

EUROPEAN ADAPTATION GUIDELINES

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PREFACE

Social inclusion has been at the heart of EU cooperation in the field of education. Since the Lisbon Strategy (2000), when education was first recognised as an important source for developing a socially inclusive EU, various documents and initiatives have been adopted at the EU level aiming at realising this important and ambitious goal: the most recent being the Council conclusions on establishing the *European Education Area* by 2025 and stressing the value of good quality, inclusive education from childhood onwards in laying the groundwork for social cohesion, social mobility, and equitable society.

The STAIRS project, implemented between 2019-2022, as part of the Erasmus+ KA3 *Support for Policy Reforms* framework, can be understood as one of the activities contributing to greater social inclusion in and through education in Europe. It builds on the demanding process of identifying, sharing, and adapting good practices in the field. In cooperation with two defined sharing countries (Ireland and Portugal) and four learning countries (Croatia, the Czech Republic, Hungary, and Slovenia), as well as the leadership of the Tempus Public Foundation in Budapest, the STAIRS consortium has developed a methodology for policy learning with the goal of strengthening social inclusion in the field of education in the EU.

The *European Adaptation Guidelines* summarises and shares the key findings of the learning process of the project with the wider EU community involved, dedicated, and interested in ensuring more equitable education environments across the EU. It is particularly addressed to experts and practitioners, as well as national and international decision-makers in the field.

The *European Adaptation Guidelines* is structured around the key steps of the policy learning process, containing key findings and tips for its implementation. Based on a strong methodological background, it can be a useful guide to follow when planning a policy learning process in the broader field of education and social inclusion. The links to the documents developed in the project for supporting the implementation of each step are included as well. Tackling exclusion in schools means confronting a complex array of problems that include social, economic, and cultural issues such as intergenerational early school leaving, poor educational attainment, the integration of cultural minorities or refugees, family unemployment, poverty, and homelessness. Developing inclusive models also includes students with special learning needs and disabilities. Specific examples of addressing these issues from participating countries are introduced as well to clarify the learning process and display the evolution of key policy messages presented at the end of the document.

The STAIRS project has done its share towards strengthening social inclusion in education in the EU. It is our sincere hope that the *European Adaptation Guidelines* will inspire the EU community to learn to do more for inclusive education, and find their own, innovative and unique ways toward this important goal.

INTRODUCTION

The main goal of the STAIRS project has been – in the learning countries – to pave the path towards effective adaptation of good practices in the field of social inclusion currently in place in the sharing countries, and to examine the adaptation process itself. One of the essential aims has been to select good practice initiatives that display effective multi-agency partnership to address a particular community or need. In order to provide context for the methodology of policy learning that we have developed and are presenting in this document, we must first provide a short overview of the project structure. The STAIRS can be summarised in three phases (research and analysis; mutual learning; exploitation). Based on the mentioned phases, we have developed the present methodology for policy learning, which includes ten steps.

Phase	Aim	Step
Research and analysis	A desk research has been conducted to identify learning needs in the national context of each learning country, and to create good practice descriptions, i.e. *case studies* for the policy learning process. This aspect of the process also includes the use of a *Good Practice Grid*, which outlines the key criteria underpinning good practice initiatives, especially initiatives that involve a multiagency response. An analysis of the good practices has been made by the learning countries to preliminary determine what good practices can potentially help and are the best fit to answer the identified learning needs.	1) Identifying national challenges 2) Finding sharing partners 3) Searching for good practices
Mutual learning	Learning events (e.g. study visits) have been organised to share, and learn from the identified good practice initiatives. Exchange of practical knowledge, discussions and networking amongst stakeholders have been at the forefront of the project (both at the learning events and later on in an online format) to gather vital information and key insights for implementing lessons learnt in the national context.	4) Preparing for study visits 5) Planning study visits 6) Implementing study visits
Exploitation	National teams have developed proposals and/or recommendations for potential adaptation of lessons learnt in their national context. By following the policy learning process, key insights from all national teams have been combined to exploit lessons learnt further at the European level.	7) Summarising lessons learnt 8) Planning the adaptation of good practices 9) Planning and managing the process of change 10) Synthesising and upscaling lessons to the wider EU community

The present *European Adaptation Guidelines* document is composed of chapters that correspond to the steps in the policy learning process. Each step summarises the process with general tips on its implementation. To gain an in-depth view of how to achieve each step, it is recommended that the supporting documents be consulted.

1. IDENTIFYING NATIONAL CHALLENGES

It makes no sense to look for good practices and solutions if there is no problem at all. The identification of challenges and learning needs is therefore the first and crucial step in learning lessons from other countries.

Anecdotal evidence and generalised opinions are not sufficient and verified indicators of existing national challenges. Instead, an evidence-based approach should be applied, utilising existing and new original research findings in the field. In the era of measurement, various data at the EU and international level are also available in the field of social inclusion (e.g. EU Education and Training Monitor, UNESCO Global Education Monitoring Report, European Agency for Special Needs and Inclusive Education data, etc.). The international (quantitative) comparative insight in combination with proper (qualitative) contextualisation of the national context can signal national challenges in the field. This must be further supported by existing national research.

Identifying key actors and indicating their assessment of the current situation is of utmost importance as well. As dissatisfaction with the current situation can foster the introduction of novelties and change, satisfaction with the current situation can present resistance to them.

Assessment of the current situation in the field and identification of the problems and challenges should be appropriately summarised in terms of learning needs. For such purpose, the **Country Report Template** can be used to identify the learning needs of countries and key actors involved.

Quick tips on how to identify national challenges:

- It is recommended that it be based on measurable data and evidence-based practice.
- It should be prepared by a national team with in-depth knowledge of the national educational system and initiatives.
- It is recommended that members of the team are from different institutions and levels within institutions (e.g. systemic level, practitioner level) to provide various

perspectives. It is particularly important to obtain insight and advice from personnel working in the field (practitioners etc.).

- It is recommended that substantial time be allocated to the preparation of the Country Report as it is to serve as the basis of all subsequent activities. It is also to provide an important background document that can be used to select and evaluate potential good practice initiatives.

Supporting materials:

- Country Report Template
- Country Report of each learning country:
  - Croatia
  - Czech Republic
  - Hungary
  - Slovenia

Example: Summary of the Country Report template

The STAIRS project consortium has developed a template to prepare country reports to provide an overview of the learning needs of a country. The template consists of six chapters and is to be filled in by experts in the field.

The basic rules for preparing a Country Report are as follows:

- Introduce key data
- Focus on key issues regarding equity and inclusive education
- Focus on proven good practices on the policy level; briefly introduce recommended interventions and measures of your country
- Raise your questions, and identify learning needs from a national perspective

The main chapters of the country report are:

1. Education in the partner country (structure of education system)
2. National context and current research: key issues regarding social inclusion
3. Terminology: integration, inclusion, social inclusion, special needs, equity vs. equality, etc.
4. Identifying key local stakeholders: institutions and professionals
5. Critical analysis of national indicators regarding social inclusions
6. Recommendations: local focus
7. Appendix – Statistics

Case: Slovenian learning needs

Based on the presented template, the Slovenian national team summarised its focus and accompanying learning needs in the STAIRS as follows. Slovenia's first challenge is related to the educational success of students with low socioeconomic status (SES). In terms of educational expectations for completing only secondary school, it is more prominent among low SES students compared to high SES students. High SES students are mostly enrolled in general programmes, and students with low SES are mostly in vocational programmes. The second challenge is related to the increasing number of students with special educational needs in vocational education and training.

2. FINDING SHARING PARTNERS

While selecting a country that could share its good practices based on available data is a relatively straightforward task, more emphasis has to be put on selecting the actual sharing partner from the country (i.e. the institution that is responsible for coordinating the collecting and sharing of good practices).

Sharing partners must be carefully selected based on their capacity and competencies pertinent to the policy learning process. To organise an in-depth policy learning experience, such a partner should be familiar with the national education system and the subject matter of the study visit(s); have time management, organisational and logistical skills; and have an open and positive social attitude and capacities for long-term cooperation. Ideally, they should be embedded within education either as a state research/policy institute or higher education institution that has developed strong links across the education landscape (preschool, primary, post-primary, etc.).

Furthermore, a sharing partner should support the entire policy learning process – fully understanding the learning needs of the learning countries, as well as being available to assist them in their adaptation dilemmas in the future. Therefore, it is an advantage if the sharing partner is present – from the identification of learning needs throughout the formulation of national adaptation plans and their implementation.

When choosing a partner, a good idea is to think about your key learning needs, and find an answer to the following questions:

- What specific areas should your sharing partner have experience/expertise in?
- Which kind of organisations (NGOs, schools, juvenile associations, institutions, etc.) will better suit your needs?
- Will a small or large organisation suit you the best?
- Are there specific countries and/or regions that you particularly want to connect with?
- Is your potential sharing partner thematically relevant? Do they have the relevant capacity, knowledge, and skills?
- Does the organisation have relevant and solid project history and good quality project outputs?

Moreover, it is important to choose an organisation that has suitable resources and the capacity to carry out the cooperation and deliver the results. It must be also sustainable regarding financial and organisational capacity.

The so-called **3Rs** should also be taken into account. First, the sharing organisation should be **reliable** so that you can be sure that expected results will be achieved in good quality. Second, the sharing partner should be **responsible** for the tasks that have been assigned to it. Finally, the partner should be **reachable** to you so that a fluid and constant exchange of information be available.

Nevertheless, exploring your existing networks could be a good opportunity as well to find the most suitable partners.

Quick tips on how to find a sharing partner:

- Based on evidence-based data, select a successful country (i.e. high achieving) in the field of interest. Evidence for a country's success can be found in reports from various sources (e.g. European Commission, international large-scale assessment data such as the PISA).
- To identify a sharing partner organisation, rely on existing networks (e.g. as part of EU Erasmus projects of your organisation), or identify an organisation based on a common work interest (e.g. a research institute) and make contact.
- It is recommended to select a sharing partner that is knowledgable on a large variety of reforms, initiatives, and/or projects in its national context and/or has a widespread network of partner organisations that can provide good practices for adaptation.
- For the learning and adaptation process to be successful, trust in the sharing partner has to be developed and sustained. Trust can be developed through a previous working relationship (e.g. in a previous project) or can be developed during the duration of the adaptation process. The sharing partner must have appropriate knowledge and networks, also, must be willing to share, and be committed to the project.

Example: Sharing countries in the STAIRS

In the STAIRS, **Ireland and Portugal** have been selected as sharing countries due to their successful efforts in fostering social inclusion in education. The justification for this can be found in results of the Programme for international student assessment (PISA). In 2018, Ireland was one of the highest performing OECD countries in reading, while Portugal was one of the countries with the most positive trends in improving students' reading, mathematics, and science achievement between 2000 to 2018 (OECD, 2019). Underachievement (i.e. students' insufficiency in reading, mathematics, or science) is a benchmark that can be used when assessing social inclusion in education. For example, Ireland has also been recognised by the European Commission as one of the countries with the lowest levels of underachievement supported by large-scale assessment data (Education and Training Monitor, 2020).

Case: Sharing partners in the STAIRS

In the STAIRS project the following two institutions have been selected for sharing good practices of Ireland and Portugal in the field:

Mary Immaculate College (MIC) is the second-largest state-funded College of Education in Ireland. It has a long and distinguished history in the field of teacher education in Ireland. At the heart of the College Mission statement lies the foundational commitment to promoting equity in society and to providing “an environment where all have freedom and opportunity to achieve their potential”. The Curriculum Development Unit (CDU) is the main Faculty research centre focused on driving teacher education through research and knowledge transfer to practice. One of the primary objectives of the CDU has been to undertake and publish evidence-based educational materials of the highest caliber to support teaching and learning in Irish primary schools. It has undertaken research and development, and publications across a wide range of pedagogical areas including literacy, numeracy, science and technology, social personal and health education, early years care and education, inclusive education, and more latterly in entrepreneurship education and development education. Centered under the auspices of the CDU, the Transforming Education through Dialogue (TED) project has a long history of facilitating linkages between mainstream primary schools and the community, particularly amongst marginalised communities.

The Lusophone University of Humanities and Technologies (ULHT) is the youngest university in Portugal, and it is also the largest non-state university. The Interdisciplinary Research Centre for Education and Development (CeiED) is an I&D unit founded at ULHT for the fields of Education, Heritage, Human Development, and Museology. It has its origins in the Centre for Research and Intervention in Education and Training (CeiEF) and was created in 2013, after some years of joint projects, with researchers from the field of human geography and museology from TERCUD (Centre for Territorial Studies, Culture and Development). CeiED integrates, in an interdisciplinary way, research and advanced training. The Centre is organised in two different Research Groups: Education, Identities and Public Policies; and Memory, Training, Culture(s) and Territory.

3. SEARCHING FOR GOOD PRACTICES

After learning countries identify and define their learning needs based on available national and international data and choose their sharing partners, sharing partners collect examples of good practices from their national context that are attuned to the defined learning needs. The data about good practices can be identified in the rich EU and international comparative data on various aspects of social inclusion in education. In addition, there are several established portals (such as the European Learning Space on Early School Leaving - ESLplus), where case studies of good practices are available and can be used for adaptation.

However, the criteria for identifying good practices that could be adapted to other national contexts should be clearly defined and should match the learning needs of the learning countries. A systematic approach must be taken when assessing good practice initiatives. In the first instance, there has to be agreement about what a *good practice* is, and what it looks like. An evidence-based approach needs to be applied, where initiatives are evaluated against criteria that when evident (in an initiative) appear to promote good practice. The approach taken in the STAIRS project has been to develop a good practice grid **(the STAIRS GRID)**, based on approximately 40 indicator questions collectively drawn up by the project partners. These indicators help identify and recognise good practice education initiatives across a variety of contexts. The GRID questions are broadly divided into five key areas to help tease out issues, reflect upon, or investigate further into initiatives they may wish to gain more insight into.

In addition, the application of the following skills is recommended when assessing potential good practices: critical thinking, analytical thinking, effective communication, and attention to detail.

We also recommend the use of the **Good Practice Template** for uniformly presenting selected practices (i.e. as case studies). A case study of a good practice elaborates on its main characteristics, success factors, and processes identified in its implementation, a description of the good practices' impact, a summary of lessons learnt from it, and resources needed for its implementation (e.g. financial, personnel).

Quick tips on how to search/select good practices:

- Build or rely on an existing network of stakeholders that can provide and elaborate on good practices.
- It is recommended that stakeholders involved in selecting good practice initiatives be based at different levels of the education system (e.g. policy makers, university

professors, researchers, school heads, counselors, and teachers). This provides a rich variety of viewpoints and considerations in the evaluation phase.

- Potential good practices can range from the macro policy level to specific micro good practices that are based at the level of individual schools in the particular educational system.
- It is recommended that good practices be evidence-based, if possible.
- It is highly recommended that a thorough desk research review of the good practice is carried out, before selecting the project.
- In particular, an identified good practice should be evaluated by an independent body. These evaluation reports can be useful in identifying key strengths and challenges, which can then be assessed by the project partners, particularly to determine whether the project should be included or excluded as a relevant good practice for the project.
- It is recommended that the STAIRS GRID be used when selecting good practices. Before using the tool, it is advised to gather documentation on the good practice or interview a person closely involved in the initiative to create thorough GRID indicators.

Supporting materials:

- STAIRS GRID
- Good Practice Template

Case: STAIRS' good practices

In the STAIRS project, the following good practices of Ireland and Portugal have been identified to serve as case studies of good practices.

Ireland:

- Delivering Equality of Opportunity in Schools (DEIS)
- Limerick DEIS Primary Schools' Literacy Initiative
- Special Education Initiative
- Transforming Education through Dialogue (TED) Project
- Youthreach Programme

Portugal:

- A School for Everyone
- Inclusion Practices in a Rural Environment – the Case of José Saramago Cluster of Schools and Educational Territory of Priority Intervention
- Promoting Inclusion and Valuing Vet Courses
- Curriculum Enrichment Activities
- Modular Training for the Unemployed without Upper-secondary Qualification
- Learning Courses to Improve Employability and to Enhance Social and Professional Inclusion

4. GETTING PREPARED FOR STUDY VISITS

The study visits are often limited in terms of duration. Therefore, it is essential that – before the visit – participants be well-prepared and have been familiarised with the good practice initiatives. Consequently, all participants, on both learning and sharing sides, need to be well-prepared and briefed to make the most out of the study visit (learning event).

Taking into consideration the complexity of the contemporary (education) public policies, it is recommended that in the learning countries, national teams be established that are comprised of project partner members and external experts on a given topic to participate in the learning event. This approach enriches the mutual learning experience by allowing multiple viewpoints and perspectives. Four elements are required to prepare the learning countries' national teams for a successful study visit. First, possessing information about good practices is essential (i.e. studying the good practice case studies). Second, being provided with different documents to be used during the study visits to track and document the learning experience. Third, organising national team preparation meeting(s) is an appropriate organisational form for reaching the aforementioned aims. Finally, the **Matrix of Challenges, Mutual Learning, and Evidence-based Local Values in National Context According to the Country Report** tool can be used to prepare national teams (i.e. to provide a visualisation of how the available good practices correspond to the learning needs).

To get sharing countries prepared for the study visit, they need to be aware of the learning needs of the learning countries and what answers learning actors will be looking for at the learning event. Based on the understanding of learning needs, content from the sharing countries can be tailored to meet the needs of the learning partners.

Quick tips on how to organise national team preparation meetings for learning countries:

- All project partner team members and external experts should take part in the preparation period.
- The main aims of the preparation meetings are to reach a common understanding of the goals of the study visits, to define everyone’s role in the mutual learning process, to explain the learning needs, and to establish what the team wants to achieve in the learning process.
- It is recommended to structure the meetings in a presentation format followed by a Q&A session.

Quick tips on how to fill in the Matrix of Challenges:

- Analyse the good practice case studies before starting the Matrix of Challenges.
- Assess how good practices could answer the defined learning needs.
- The STAIRS GRID is a useful document to assist in this phase. It can help create a blueprint for questions to ask in areas into which more insight is required, for instance:
    - What have you found that is directly useful for you and could be broadly replicated in your country?
    - What could be adapted or expanded to suit your needs, and how?
    - What, though interesting, would be unworkable within your learning needs, and why?
- Acknowledge and make note of initiatives (if available) in your national context that aim to address similar learning needs.
- Match as many good practices to a learning need as possible.
- Interpret the Matrix of Challenges by checking the matches between learning needs and good practices. If a good practice is matched to a learning need, then that practice could be useful for the learning country and is of particular interest at the learning event.

Quick tips on how to get sharing countries prepared:

- Familiarise yourselves with the learning needs of the learning countries.
- Think of preliminary answers to learning countries.
- Once the case studies have been selected, contact key persons working within the initiative to facilitate presentations.
- A briefing document about the aims and objectives of the study visit needs to be devised and sent to key persons involved in the initiative, requesting their participation in the study visit. This document should outline the aims and objectives of the study visit, the expected outcomes, and what is required from their participation. They should also be briefed about the knowledge and expertise of the visiting partners (policy makers, teachers, teacher educators, etc.)

Supporting materials:

- Matrix of Challenges, Mutual Learning, and Evidence-based Local Values in National Context According to the Country Report
- Users' guide to prepare for a study visit and the adaptation process in the field of social inclusion

EXAMPLE: Matrix of Challenges of Hungary

The Matrix of Challenges enables learning countries to match their learning needs with good practices from sharing countries. Specifically, it provides a representation of the possible connection between a learning need and a good practice. Additionally, the Matrix of Challenges provides an overview of national policies, initiatives, or projects related to a learning need that is already in place in a learning country.

Figure 1: *Hungary's learning needs and interventions already in place to address them*

GENERAL	COUNTRY CONTEXT	
CHALLENGES	MUTUAL LEARNING	EVIDENCE-BASED VALUES
SYSTEMIC LEGISLATION		
• **longitudinal development**	models for high-quality education for all	**Recording and supporting disadvantaged and multiple disadvantaged families and learners** (since 2003), although the covered population narrowed by legislation the number of the target population increases (Varga, 2018), this system provides more or less comparable data for exploring social inclusion
• **adequate interventions**	models for efficient systemic interventions	**National Competence Test** (since 2001): in the field of literacy and mathematics all 6^{th}, 8^{th}, and 10^{th} grades (between 2004 and 2013, 4^{th} graders included), this system provides comparable data in the fields of these key competences, for exploring the differences of accessing to key competences.

Figure 1 shows how Hungary already has some initiatives concerning longitudinal development and adequate interventions related to systematic legislation in place.

Figure 2: *Match between Hungary's learning needs and a good practice*

MATRIX FOR MATCHING MUTUAL LEARNING NEEDS AND OFFERS			
GENERAL	COUNTRY CONTEXT: SHARING COUNTRY: IRELAND LEARNING COUNTRY: HUNGARY		
CHALLENGES	MUTUAL LEARNING	EVIDENCE-BASED VALUES	MATCH
SOCIAL DIMENSION			
• adequate policies	Hungary	Limerick DEIS Primary Schools' Literacy Initiative	√
• poverty and discrimination	Hungary	Limerick DEIS Primary Schools' Literacy Initiative	√

Figure 2 shows Hungary has recognised that the Limerick DEIS Primary Schools' Literacy Initiative could be beneficial in terms of addressing their learning needs of establishing adequate policies and focusing on facing poverty and discrimination.

5. PLANING STUDY VISIT(S)

As a study visit (learning event) is both a sharing and a learning experience, planning both aspects is needed to ensure all participants get the most out of the learning event and that the goals of the learning event are achieved.

Planning the learning aspects is recommended to be focused on two elements: pre-visit communication and establishing a learning content management system (LCMS). First, the pre-visit communication with participants should include a Technical Guide for the study visit with tips on how to participate in the study visit actively. The technical guide should reflect on the format of the study visit (e.g. online or in-person). Second, using a Learning Content Management System (LCMS), such as **Canvas**, enables the organisation to launch an introductory online learning course before the study visit takes place. It is recommended to use a closed LCMS (i.e. access open only to national team members) so participants can have a safe and closed space to interact virtually. In the LCMS, participants can introduce themselves, communicate and interact with one another, engage in discussions and complete the aforementioned preparatory online course. All national team members must take part in the activities to become fully able to exploit the learning event.

Careful planning of the sharing aspects is strongly recommended. One of the most important elements is the identification of key people that share knowledge, skills, and expertise with the learning countries. They need to have a thorough knowledge of the initiative, from its initial inception to its current operation. They must be willing to share both the positive and challenging elements of the initiative, as well as reflect on their strengths and weaknesses, and possible areas for development in the future. This will then enable the learning partners to assess and evaluate potential adaptation issues.

Quick tips on how to organise study visits:

- Ideally, a range of key people working within the initiative could be invited to co-present on the good practice. This will provide an opportunity to assess and evaluate the good practice from several fronts (policy & funding level, management, and implementation level, i.e. a state department representative, a school leader, and a teacher).
- Where possible, it is recommended that the learning partners get the opportunity to visit the initiative in operation and speak with the end-user such as students, adult learners.
- Follow-up meetings need to be organised in the weeks leading up to the study visit, to ensure presenters are fully briefed and have appropriate material developed for the study visit.

- The development of the study visit itinerary needs to be drawn up in the weeks leading up to the study visit. The lead partner needs to be consulted in this process.
- Developing a sharing, open and honest dialogue amongst all participants is important, and several icebreakers are recommended for the first session.
- It is recommended that arrangements are put in place for recording the case study presentations to enable learning partners to listen back to the presentations.
- Self-evaluation questionnaires and learning diaries need to be devised to enable participants to record any mindset change, preliminary ideas for implementation, etc.

Quick tips on how to plan study visits:

- Careful and thorough preparation is needed for both sharing and learning partners, both should consult the leading partner in this process.
- The introductory online learning course should be structured so it gives participants all the necessary information and knowledge for the study visit (modules can include: introduction to the adaptation process; getting to know the participants; learning needs of learning countries; good practice GRID, good practice case studies; getting familiar with the documents used at the study visits).
- Plan a preparation period in the weeks leading up to the study visit in which participants prepare using the LCMS online course.
- Sharing partners should enable and encourage the experts who will be presenting the good practice initiative at the study visit to engage with the LCMS online course. This will provide them with in-depth insight into the overall aims and objectives of the project and consult all background material. This will also allow all partners to interact informally, before the study visit.
- Sharing partners should keep in touch with the expert presenters to resolve and answer any queries leading up to the study visit. It is essential that they are knowledgeable and fully briefed about the learning partners and their specific requirements.
- Sharing partners should review the expert formal presentations to ensure they are appropriate, detailed, and challenging for the learning partners.
- Sharing partner, in consultation with the lead partner, should aim to organise the study visit that is appropriately balanced between formal presentations, Q&A sessions, individual country consultations, and social events.
- Sharing partners should develop several ice-breaking and warming-up activities that are based on the aims and objectives of the study visit, also, enable partners to get to know one another in a fun way.

Supporting materials:

- Canvas

Example: Establishing a Learning Content Management System (LCMS) as part of the planning of the study visits

A CANVAS online course has been prepared in the STAIRS to guide national teams through the preparation and planning for the study visits. It is intended to be used individually, but it can also include group work.

Figure 3: *Introductory page of the CANVAS online course for the STAIRS*

Figure 4: *Examples of modules available on the STAIRS CANVAS online course*

6. IMPLEMENTING STUDY VISIT(S)

Study visits represent the main learning activity of the adaptation process in which national teams gather to participate. The purpose of this learning event is to facilitate mutual learning, e.g. sharing and learning from good practices in which all participants learn individually according to their own and recognised country's learning needs. Additionally, study visits enable participants to interact and discuss ideas with other participants.

The activeness of sharing (hosting) and learning actors must be at the highest level. Additionally, sharing actors must present good practices clearly to provide learners with a basic overview. However, sharing actors need to be well prepared for in-depth questions of the learning actors as the goal is to give them enough information for addressing gaps in their knowledge related to a learning need.

Learning actors structure their learning process by creating **Learning Diaries** documenting all relevant experiences by taking notes, and under special permits taking pictures or videos, as well as completing a **Self-Reflection Questionnaire**. These documents provide structure to scaffold the learning experience. Finally, if study visits are online, presentations of good practices should be recorded to enable participants to reengage with the learning process at a later stage.

Important parts of study visits are social events that create sapce for networking and learning informally. Social events can also be organised in case of online study visits. An online social event could be organised around a music session or an intriguing lesson on the host country's culture and language. This contributes to building a sense of community amongst the visiting and hosting partners.

The learning process does not end with the culmination of the study visits. Following the study visits, it is necessary to gather all completed learning materials (e.g. self-reflection questionnaires, learning diaries and study visit evaluations, etc.) in an LCMS to be used for further learning. Keep in mind that the mentioned learning materials could be confidential documentation in terms of the project and could not be directly shared outside the partnership. An LCMS facilitates this process, allowing at the same time everyone to access all documents in their learning process at any given time. It also enables stakeholders to interact after the study visits.

Quick tips on how to implement study visits:

- Good practices should be presented broadly to provide an overview, while the Q&A sessions give participants a chance to ask for specific details concerning the good practice that matches their learning needs.
- It is recommended that at the learning event, the good practice initiatives are organised and introduced in a presentation & discussion format (45 minutes for a presentation and 45 minutes for Q&A discussion sessions).
- Frequent short breaks (5 to 10 minutes) are needed between activities in the learning event to assure the well-being of participants and enable social interaction. Breaks can also be considered as short networking opportunities to learn about a specific good practice informally, to clarify any issue, or indeed, ask a more specific country-level query.
- Bear in mind that virtual meetings can be straining for participants therefore it is preferred to think about the well-being of attendees. You can use wellness guides for online meetings or healthy meeting checklists. See examples below[1] or create your guide.
- If the study visit is an online event, the hosting partner must allocate technical support to the event, in the weeks leading up to the event and during the event. This includes scheduling the online meetings and being on standby to resolve technical issues.
- Technical support should include the development of a technical manual on accessing the meetings and login details. This is particularly important when partners are not familiar with the online platform being used. Ideally, a pre-study visit meeting should be organised by the host partner to test the online platform and ensure visiting partners be introduced to the platform, and answer any queries or concerns.
- It is important, especially if the study visit is online, that participants are fully briefed about the protocol regarding participation and online etiquette such as the procedure for asking questions, making comments, and turning the camera on/off.
- Organising a social event for all participants (e.g. guided tour of the host city and dinner) can be a boost to networking and social interactions.
- In the case of online implementation, established tools such as Microsoft Teams or Zoom can be used. The learning event can be made interactive by using breakout rooms or tools such as Padlet, Mentimeter, or Google Slides. It is important to allocate a moderator who is in charge of recording the sessions, and who will also monitor any questions posed in the chat function.

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[1] Ideas for wellness guides can be found on the following links: https://ucdavis.app.box.com/s/5xlvef03nzcwxj4uhggdzcsdm8wiplbx ; https://www.wsps.ca/resource-hub/articles/10-best-practices-for-productive-low-stress-virtual-meetings

- Plan how an LCMS can be used following the event of the study visit (e.g. as a repository for additional resources).
- Discussions about the good practice presentation can continue online within the LCMS.

Supporting materials:

- Self-Reflection Questionnaire
- Learning Diary Template
- Padlet, Mentimer, Google Slides.

Example: Structuring a study visit

In the STAIRS, both the Irish and the Portuguese study visits have been implemented online with organised presentations of good practices, followed by Q&A sessions with the presenters, and work done in groups to discuss each good practice amongst participants.

Figure 5: *Part of the Agenda of the Irish study visit in the STAIRS*

Wednesday 4 November

9:00 am	Welcome
9:15 am	**Transforming Education Through Dialogue (TED) Project**
	Presenter: Dr Ann Higgins, TED Coordinator, MIC
	Facilitator: Angie Canny (MIC, Ireland)
9:45 am	Discussion [Four country breakout room consultation - Hungary, Croatia, Czechia, Slovenia]
10:00 am	Whole Group Q&A with Dr Ann Higgins
	Facilitator: Angie Canny (MIC, Ireland)
10:45 am	Coffee
11:00 am	**YouthReach & Education Training Board**
	Presenter: Paul Patton, Director of Further Education & Training, Limerick and Clare Education and Training Board
	Facilitator: Angie Canny (MIC, Ireland)
11:30 am	Discussion [Four country breakout room consultation - Hungary, Croatia, Czechia, Slovenia]
11: 45 am	Whole Group Q&A with Paul Patton

7. SUMMARISING LESSONS LEARNT

Summarising lessons learnt is an important process after the study visits have been concluded. This enables national teams to agree on key messages and takeaways based on the good practices of sharing countries. Even though at the study visit each actor learns on their own, the actors are part of national teams that are working towards a common goal.

The national teams meet (either online or in-person) to prepare the "**National JIGSAW"** (i.e. the national summary of the main lessons learnt based on each actor's learning). The national summaries are compiled in a single document in a single structure to serve as a base for the national adaptation plan.

The national summaries should be gathered and uploaded to a section inside the common online course as part of the Learning Content Management System (LCMS) so that it is accessible to all study visit participants. Keep in mind that the national summary of one country can also be beneficial to another country's learning process.

Quick tips on how to summarise lessons learnt:

- A short draft of the main lessons learnt should be made shortly after the study visit event. Learning diaries and self-reflection questionnaires can feed into this document.
- Lessons learnt should be connected but not limited to the country's learning needs. Broader lessons can be learned that go beyond learning needs defined at the beginning of the process.
- Lessons learnt by each participant can be grouped based on common themes (similarities between the lessons learnt of individual participants) and to provide an overview of which lessons have been mutually agreed upon.
- Agreed upon lessons learnt in the national teams should be the basis for the National Adaptation Plans.

Supporting materials:

- Users guide to prepare for a study visit and the adaptation process in the field of social inclusion (National JIGSAW)
- National Summaries of lessons learned from Ireland and Portugal study visits
    - Croatia
    - Czech Republic
    - Hungary
    - Slovenia

Case: National Summary of the lessons learned – Czech Republic

The Czech Republic summarised their lessons learned from the Irish study visit as follows.

The visit to Ireland revealed the following facts which we need to consider when creating inclusive education that is highly protective, individual, and respects the special educational needs of the pupil. We also have to think about the inclusion practices of the Roma students. In the Czech Republic, involvement of the social system should be at the forefront of inclusive practices, as well as cooperation with families. Furthermore, we identified the following topics in our lessons learnt that need to be worked on in the Czech Republic after the study visits:

- The need for further education of pedagogical staff (not only teachers but also teaching assistants and other professionals) who are involved in the education and training of pupils with SEN, as well as having close cooperation between parents and the social body – in our country the OSPOD (Authority for social and legal protection of children).
- DEIS tries to equalize the different „starting positions" of students. The question will be how to balance this starting position, and to ensure close cooperation with the social and health care system, schools, and families in the Czech Republic.
- The deprivation index is interesting as it evaluates the degree of disadvantage in particular areas – an interesting idea for implementation in the Czech Republic.
- Increasing the motivation for regular school attendance of pupils from different socio-cultural backgrounds – establishing communication channels between all involved stakeholders in the education and training of pupils with SEN.
- Providing effective support in accordance with the degree of disadvantage.
- Setting up cooperation between parents, schools, school counseling services, social departments, and the health care system.
- Establishing how to increase motivation for compulsory education and regular school attendance in vulnerable groups of students.
- Supporting children to develop their maximum potential with regards to their special educational needs.
- Developing an ethos of trust in special education for children and pupils with more severe forms of disability. Focusing on a highly professional approach and specialized educational methods, as well as providing career orientation support.
- Supporting further education of students when completing compulsory schooling and providing support for making responsible career choices.

8. PLANNING THE ADAPTATION OF GOOD PRACTICES

To plan for a successful implementation of good practices and lessons learnt in a learning country’s national context, it is essential to keep in mind three key areas:

- National Adaptation Plans
- National Discussion Forums
- Wider Dissemination and Exploitation

The three areas enable lessons learnt from abroad to be transferred to each individual country's context.

National Adaptation Plan (NAP)

NAPs represent plans for adaptation based on the mutual learning process and are based on the lessons learnt from the learning event.

The development of the NAP requires the input of all national team members involved in the study visits. Critical thinking, effective communication among stakeholders, and exchanging different perspectives are crucial when formulating the NAP. This is needed because of the demanding adaptation of the good practices to the particularities of the respective national context. The **NAP Template** aims to aid this process by structuring the planning and writing of the national adaptation plan. The **NAP Concept Paper** further elaborates on the structure of the template.

Quick tips on how to prepare the NAP

- A starting point for writing and compiling the NAP can be posing the following question: “How can we use the lessons learnt from the good practices to address a learning need and develop an intervention or a set of recommendations that can be supported on policy level?”.
- The NAP should be built on the work having been previously done as part of the Country Report (i.e. the defined learning needs) and also, on national lessons learnt from the learning event.
- Carefully consider the purpose of your NAP at the beginning (i.e. do you wish to adapt a specific good practice, policy framework in the national context, or is it a set of recommendations that are brief but open up possibilities for initiatives in the future).

- The NAP can be developed in the form of recommendations for the national education system or in the form of steps (i.e. an action plan) on how to incorporate lessons learnt in the national context.
- When writing the NAP, it is recommended to consult the good practice case studies, the Country Report, and the additional documentation available from the study visits (learning diaries, self-reflection questionnaires, etc.).

National Discussion Forums

National Discussion Forums are expert forums, where a wide range of invited participants have the opportunity to discuss the good practices and explore national adaptation opportunities presented in NAP. They are organised by national teams and aim to connect with stakeholders that have not participated in the learning process.

Quick tips on how to organise discussion forums:

- Carefully consider the purpose of the National discussion forum (possible purposes include: presentation of the national adaptation plan and discussion about the possibilities of its implementation in the national context; connecting stakeholders to plan future initiatives based on lessons learnt and national adaptation plans; connecting stakeholders to discuss and foster policy changes or policy formulation).
- National discussion forums can be held in different formats (e.g. presentation and Q&A sessions, working in smaller groups, networking sessions).
- Assess the target group for the discussion forums (i.e. policy level decisions makers, researchers, academics, school principals, teachers). The target group depends on the type of the national adaptation plan and what aims are to be achieved by implementing a discussion forum.
- Issue invitations to the national discussion forum and accompanying documentation (e.g. national adaptation plan) well in advance to garner interest amongst stakeholders. It is also important to give them enough time to read the documentation and prepare for the discussion forum. This maximises the potential of the discussion forum.
- If required, prepare a summary of the main conclusions emanating from the discussion forums to further assist the adaptation process.

Wider Dissemination and Exploitation

It is important to disseminate the knowledge and information acquired during the adaptation process in the national learning context. Thus, it is important to have a strong dissemination strategy in place that enables the upscaling of the lessons learnt and the adaptation process to a wider audience. The **STAIRS Dissemination Plan Template** has been developed to plan to reach a wider audience.

Quick tips on how to disseminate widely and exploit fully:

- Plan dissemination channels (e.g. e-mail lists, social media posts such as Facebook or Twitter, institution website posts, and press releases).
- Identify the target audience and plan how to reach them.
- Dissemination activities can lead to or follow up a main learning and adaptation process activity or event (e.g. study visits/learning event, summarised lessons learnt, national adaptation plan).
- Create a project homepage with the projects' outputs.
- Produce printed materials such as flyers, booklets, information brochures, etc.
- Use research results and experts' conclusions in preparation of methodologies of workshops.
- Organise knowledge exchange events for stakeholders and experts.
- Organise discussion forums to share findings and results.
- Prepare papers, posters, and presentations for conferences.
- Compile articles, book chapters, etc. based on research findings emerging from the project.
- Report to Governing Authorities in your country.

Supporting materials:

- National Adaptation Plans
  - Croatia
  - Czech Republic
  - Hungary
  - Slovenia
- National Adaptation Plan Template
- National Adaptation Plan Concept Paper
- The STAIRS National Dissemination Plan Template

Case: Discussion forum in Croatia

A discussion forum on Promoting Inclusive Education and Improving the Education of Vulnerable Social Groups - Experiences and Recommendations from the STAIRS Project was held online on February 15th, 2022. During the Forum, activities and results of the STAIRS project were presented and the participating experts held lectures: doc. dr. sc. Nikolina Žajdela Hrustek, prof. dr. sc. Kirinić Valentina Kirinić, doc.dr.sc. Zlatko Bukvić, and Marijana Dodigović, prof. and B.Sc. psychologist.

The presentations were followed by a half-hour Q&A session. The main conclusions from the forum can be summarised as follows:

> *"Inclusive policy is at a high level in our country, it is declaratively positive, but it needs a 'push'. We have very good regulations, many examples of good practices of* sensitisation *for students with disabilities and implementation of educational inclusion, but altogether needs to be more systematised and harmonised. Especially, when it comes to implementation of laws and recommendations. Also, all procedures should be monitored and measured in order to improve results and ensure active cooperation of all stakeholders. Efforts to improve inclusive education should be supported by all stakeholders, especially at the local level, using all the resources we have."*

The forum was attended by all members of the STAIRS team, representatives of the Croatian Employment Service, Public Institutions for Regional Development of Varaždin County, numerous secondary and primary schools and universities with pedagogical departments and Varaždin County.

The Forum was recorded and it is now, along with all materials, available online for participants who weren't able to join: https://www.varazdinska-zupanija.hr/vijesti/stairs-forum-dobra-regulativa-i-praksa-nedostaje-uskladivanje-ceka-se-zamah.html

Figure 6: *Snapshot of the Croatian discussion forum*

9. PLANNING AND MANAGING THE PROCESS OF CHANGE

While planning the adaptation of good practices is an important task to consider, even more attention is recommended to be given to the process of managing ***mindset change***. In the STAIRS, we have set out to build upon existing good practices of providing social inclusion in education. However, achieving social inclusion in education requires substantially more than just adapting good practices, it requires all stakeholders (i.e. policy makers, school leaders, teachers, counsellors, students, parents) to accept *an ethos of providing each student with opportunities to obtain equal outcomes*, especially in regards to vulnerable groups of students.

Change management is often the key component in driving the success of any venture. However, change initiatives are not all equally disruptive. Some will have a greater impact and be more challenging. Others may be barely noticeable. The **NAP Concept Paper** has precisely considered this possibility of change, indicating that the recommendations for adapting policies/best practices should be those that best adapt to the national context, without changes, as they can be adopted directly, or modified to better suit them.

To provide for the successful adaptation of a policy, initiative, and/or project, change management is often a key component. The **Change Management Toolkit (CMT)** has been created to help foster change amongst stakeholders. It is a set of proven tools and techniques to aid the individual in managing change. The toolkit can be used when planning or realising the national adaptation plans in national contexts.

Since there are many complexities involved in executing a change initiative, both change management and project management components are required. Sometimes change management and project management are mistaken to be the same, but they are two complementary yet different disciplines. Both use formal processes, tools, and techniques to plan for the change, manage the change, and sustain the change. While change management focuses on ensuring the support of the people, project management focuses on tasks to be executed. Coupled together, pro-active change management and project management will lead to the actualisation of the benefits of the change initiative.

Thus, the CMT of the STAIRS has considered the change management generically recommended in the NAPs, giving special emphasis to the role of people, since the common denominator to achieve success for all change initiatives is *people*. Therefore, the CMT is divided into two parts: a conceptual part, addressing issues of change for fostering social inclusion in and through education; and an instrumental one, presenting a set of tools that are considered useful to carry out the change foreseen in the NAPs. These tools have been selected considering who the recommendations in the NAPs are addressed to (policy makers, school leaders, teachers, educational experts, academics, researchers, parents, students, etc.)

and should put those recommendations into practice. Some of the tools are meant to be used by specific change agents and others to be used by everyone involved in a change process, as the diagram below shows.

Quick tips on how to use the CMT:

- Evaluate your NAPs, and consider how you can divide your adaptation plans into change management and project management processes.
- Consider what kind of *mindset change* is needed to successfully implement your planned adaptation, and which tools can aid you in this process.

Supporting materials:

- Change Management Toolkit
- The NAP Concept Paper

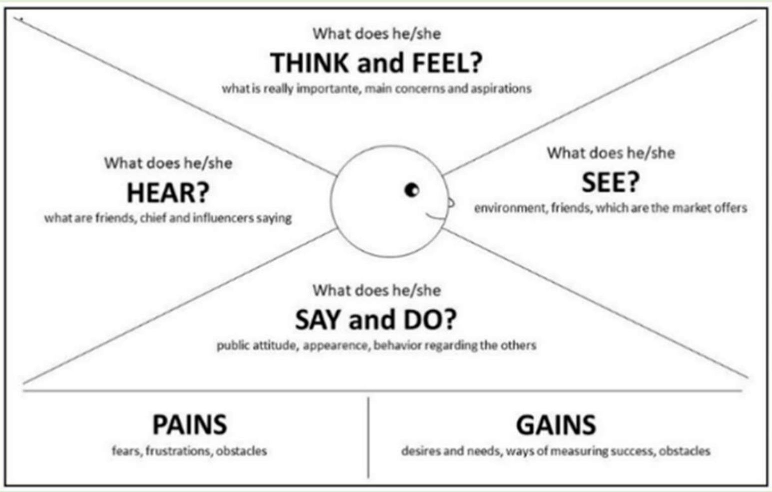
Example: Tool from the Change Management Toolkit (CMT)

Tool #3. Empathy Map

To make a change in education, such as those foreseen in the NAPs, demands to begin with the process for the deeper understanding of the people coming to carry it out. To gain these insights, it is important for the leaders of the change process to empathise with the implementers so that the leaders can understand the implementers needs, thoughts, emotions, and motivations. For that, the „Empathy Map" (EM) stands out as an adequate instrument to collect data. The Empathy Map is a "design thinking" tool and it was created with a specific set of ideas and is intended as a framework to complement an exercise in developing empathy.

A vast literature points out that about 70% of change processes fail due to the lack of engagement from people responsible for carrying it out. So, it is not enough to communicate well, it is necessary to get the implementers involved. And engaging with people reveals a tremendous amount about the way they think and the values they hold. A deep engagement can surprise both the leaders of a change process and the implementers by the unanticipated insights that are different from what they do – are strong indicators of their deeply held beliefs about the way the world is. So, following the Communication Plan (Tool #2), EMs shall be filled in by the implementers and the content analysed by the leaders of the change process.

Figure 7: *Empathy Map Template*



Adapted from https://www.nngroup.com/articles/empathy-mapping/

10. SYNTHESISING AND UPSCALING THE BENEFITS OF THE SHARING AND THE LEARNING PROCESS TO THE WIDER EU COMMUNITY

The STAIRS project has enabled six EU countries to intensively work together in partnership to share and learn from good practices in the field of education to strengthen social inclusion to support policy reform(s) across the EU. For this purpose, based on the learning experiences of the STAIRS project, the messages, which have synthesised individual lessons learnt from all partner countries, have been formulated to enable key findings to be distilled and incorporated in various initiatives or policy planning at the EU level. Thus, attention has been devoted to identifying where to emphasise further development of initiatives in the field (see below).

Even though the adaptation process is part of a mutually learning framework, national teams learn and develop possible adaptations of lessons learnt independently from each other. Thus, they can have substantially different views on what can be adapted according to their country's contexts. This is essentially a cultural and contextual issue that always needs to be kept in mind when adapting policies and initiatives from other countries, even from EU countries. However, even though countries have different starting points and contexts' concerning social inclusion, similar themes of lessons learnt from all participating countries can be distilled to generalise lessons to provide policy messages for the EU level that can benefit all member states. This enables a policy learning process to not only benefit individual countries but also benefit the common framework that links participating countries together (i.e. the EU).

Quick tips on how to provide recommendations and policy messages for other countries and the EU:

- Gather perspectives from all national teams on what the key findings are in the adaptation process.
- Group proposals together based on similar content.
- Prepare a proposal incorporating all national perspectives on lessons learnt.
- Schedule an international webinar with all partners for interested parties from any Member State. Beforehand, agree on lessons learnt and key policy messages to be forwarded by the partnership to the audience.

KEY CONSIDERATIONS FOR SUPPORTING SOCIAL INCLUSION IN EUROPE

Taking into consideration the project results and existing EU agenda in the field of strengthening social inclusion in education, the STAIRS project has identified the following key topics (messages), which are important to respect in order to follow the EU goals concerning social inclusion in education:

a) Strengthening sensitivity to social inclusion in education among key actors at the EU and national level (policy decision-makers, experts, practitioners).

b) Establishing an appropriate policy framework at the EU level (Resolutions, Conclusions, Recommendations) and national level (laws, regulations, procedures), which would ensure the equal educational opportunities of diverse learners to be respected.

c) Updating initial and continuous professional development of teachers and define teacher competencies frameworks required to strengthen social inclusiveness of education.

d) Designing problem-based education and lifelong curriculum, which would allow diverse learners to acquire the right competencies to be sucessfully integrated in society and the labour market.

e) Building a strong quality assurance system in order to maintain and constantly improve quality and effectiveness of inclusive education.

f) Enhancing opportunities and abilities of the system to learn, network and exchange good practices.