



Managing the European Inclusion Compass

A Guideline for using the European Inclusion Compass

Supporting Practices for Inclusive Schooling & Education for the Youth (SPISEY)

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***“Management is about doing things right
Leadership is about doing the right things”***

Peter F. Drucker

“And working with social inclusion in schools requests leadership”

The SPISEY Project Team



1. Introduction

The European Inclusion Compass, and the overall aim and context for this, is presented in the Background Document. The present document is the Managing Document, which takes the Background Document one step closer to practice, as it contains ideas and examples of how to manage and apply the European Inclusion Compass in practice. It is an inspirational document, and of course meant to be adapted to your local situation and needs. The Managing Document shall be regarded as a catalogue of inspirational inputs and not as a normative or imperative 'thou shall do' guide, as there is not one and only way to use the compass and its components. Hence, you can read about some general reflections on the overall perspective which, for any school management, headmaster, or group or team of leaders, could be useful to go through.

The document also presents a concept of how to scaffold the process of involving stakeholders in the process of change based on the European Inclusion Compass.

Finally, in this document you can learn from other's experiences, as a case example from a school that has applied the compass is presented.

When choosing to work with the European Inclusion Compass, this Managing Document should be connected to- and used together with the PowerPoint Presentation developed as a generic presentation of the compass.

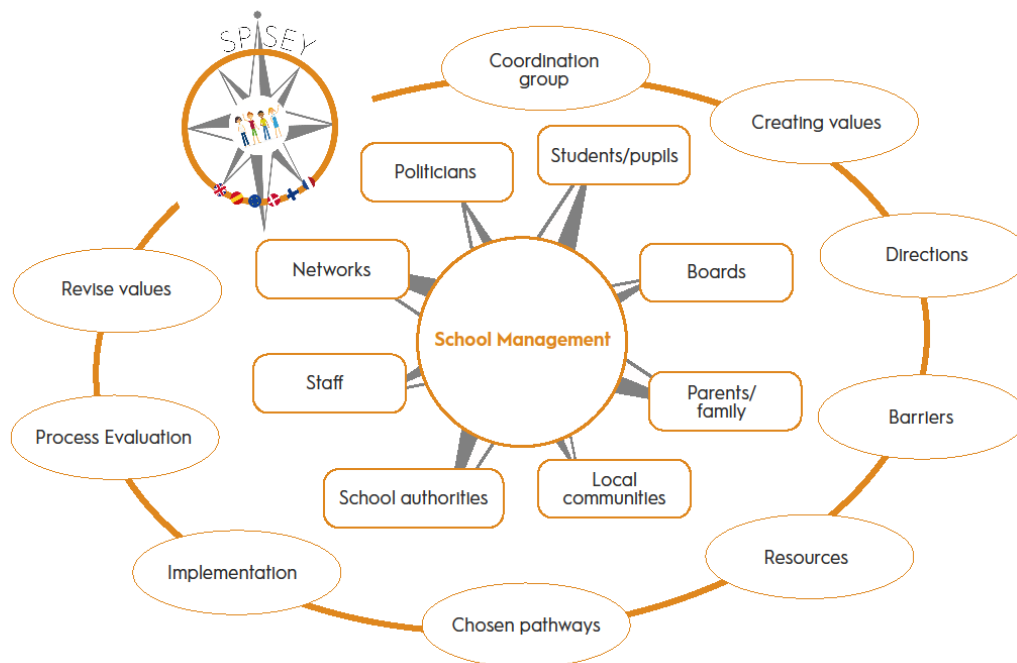
And of course, the Toolbox developed for use and support working with the European Inclusion Compass and the 9 components should be visited in order to get ideas and answers for the HOW to do it.

You can find this document, together with all other parts of the European Inclusion Compass on the SPISEY resource and knowledge platform here: www.spisey-project.eu

2. Managing the process of using The European Inclusion Compass

The idea behind the European Inclusion Compass is that inclusion needs leadership to be implemented in any school or educational institutional practice, as promoting inclusion always relates to the use of resources allocated and decisions about dilemmas with consequences. As leadership also is about taking responsibility for both the process of change and the collaboration between persons or stakeholders participating in this, the need for a certain sensibility from any school management in these matters is needed. Therefore, the European Inclusion Compass contains three levels that focus on 1) taking leadership as school management in a development process, 2) involving the relevant stakeholders in the process and how to collaborate with them, and 3) the concrete process activities to work with and implement values that support inclusive schooling.

Figure 1: The European Inclusion Compass



Managing the process of using the compass in many ways equals any other leadership assignment. On the other hand, the bare mention of the concept “social inclusion” in some environments, seems to offend professionals and other stakeholders. This without doubt, is related to how wishes for more inclusion in many countries all along the way, has been linked to political decided cuts of school budgets. With this in mind, it is necessary to reflect upon strategic perspectives and actions to be taken in the process of using the compass. This is very much about management and naturally this will be focus in this text about ‘managing the process of using the European Inclusion Compass’. The presentation of possible and expected challenges in managing the process refers to the Background Document and the in-depth presentation of the European Inclusion Compass there. To avoid too much overlap, the text below only occasionally will refer to the Background Document.

In the text ‘school management’ will be used as the common expression for any kind of school leadership like heads of school, decan, school manager, team of leaders etc.

In the following text, an overall introduction, from a school management perspective, will be provided by focusing on the three levels in the compass: 1) School management level, 2) The stakeholder level and 3) The nine elements in the process

2.1 School management level



As written on the front page of this document, there is a strong need for leadership, when a school wants to work with social inclusion and inclusive schooling. It is an area filled with dilemmas and strategic decisions, and in order for the staff fulfilling their professional responsibility and coping with the attendant challenges, inclusive schooling is a field of leadership that cuts across all four discourses of social inclusion, which are 1) the economic discourse, 2) the pragmatic discourse, 3) the political discourse and 4) the ethical discourse¹. Both school management and staff meet the four discourses daily as justification for or against inclusion. There is an important leadership function here in contributing to a clarification of which discourse is brought into play in the ongoing discussion of developing the inclusive school.

It is especially a challenge for school management to clarify that all four discourses can be invoked, but that a single discourse cannot determine the agenda for the school's total enterprise. In order to qualify this discussion, it would be constructive if the discourses were used to keep political, economic, ethical and pragmatic arguments separate. In this way the discourses can be used to focus on the scope of leadership – and not only to specify which areas are the responsibility of school management and which are the responsibility of the professional staff. Once again it is important to emphasize that school management needs to strengthen the staff's professional competence in working with a 'social didactic' that focuses on the terms on which children participate in school activities for the purpose of learning.

2.1.1 Actions for School Management

The development of an inclusive school therefore depends on two important prerequisites:

- Development of the proper professional competences within management as well as within teaching staff are required to fulfil the school's goals in relation to inclusion
- Development of the school's leadership to engage all those involved with the school in an active school community in the inclusion project. What this specifically entails for management in perspective of inclusion is elaborated on in the following.

Inclusion from a leadership perspective is a management tool which assists school management in:

- Contributing organizational conditions which allow internal as well as external stakeholders to be interested in inclusion to play a motivated and engaged part in the process. The overall leadership task is to involve the stakeholders interested in the school in such a way that each can make a contribution to the inclusive school - a collaborative and co-creating aspect that becomes the general principle in using this Compass.
- Creating and formulating common directions for those involved with inclusion by involving them and coordinating their resources,
- Developing and formulating a joint framework for the individuals involved, thereby enabling them to act based on common values, directions, barriers, resources, and chosen pathways.

With these perspectives it is obvious that launching a project using the European Inclusion Compass it will be necessary for any school management to reflect on- and take into account strategic positions and interests related to upcoming decisions and actions.

¹ See the Background Document for more information about these 4 discourses



2.2 Stakeholder Level

The second level of the inclusion compass shows the different stakeholders, which are all relevant in the process on creating, developing and maintaining inclusive practices. Stakeholders are important as key persons with basic knowledge and experience about dynamics supporting inclusion and causing exclusion. But these key persons are also key resources in the process of planning, carrying through and evaluating change as their involvement and possibilities for agency is crucial for quality in the process.

In relation to stakeholders a number of internal and external stakeholders can be identified as important as partners for collaboration in the process. The number of stakeholders will be different from school to school or from case to case and hence any process applying the Inclusion Compass must be adapted according to which relevant stakeholders should be involved. To get to know that implies some local research, as school management need to reflect and investigate the number and nature of local important stakeholders. Some stakeholders will of course already be well known collaborators but it is important to make sure, that no relevant stakeholder will be left out from the process due to neglect or serendipity. In Figure 1 on page 3, 'the inner ring' illustrates the most common stakeholders for almost all schools or educational institutions. (For further information on stakeholders and definitions of stakeholders, please read about this in the Background Document).

2.2.1 Actions in Cooperation with the Stakeholders

Any stakeholder is by nature interested in contributing to any kind of process optimizing quality for the school or organization the stakeholder is involved in. Nevertheless, school management should focus on how this involvement is created, supported and maintained throughout any process attempting to flat out the inevitable 'bumps'.

The stakeholder perspective in the European Inclusion Compass is important on two levels. In the 'big picture' using the compass, it is crucial that no stakeholder is left behind as it unfortunately often happens. When any school or educational institution is starting a process of change it will be absolutely necessary to investigate thoroughly possible stakeholders relevant for the process of change. Of course, school management generally will have knowledge about possible stakeholders, but it will be important to decide which stakeholders would be mandatory for the process and which kind of stakeholders could be considered as participants.

In the 'small picture', in setting up a Coordinating Group in order to start a process of change using the compass, school management needs to reflect on key persons that are important for getting a positive and productive kick off. To support this endeavor and hopefully succeed with the application of the Inclusion compass, both process and the stakeholders must be scaffolded, and in order to do this six specific focus points could inform school management².

The six steps presented below are common obstacles in (m)any change processes calling for close awareness and should all be regarded as a scaffold for starting up change processes:

² Scaffolding is a concept which origins from social constructivist theory and more recently it has been elaborated by Jerome Bruner (1915 – 2016).



Recruiting stakeholders

- First and foremost, school management must mobilize interest. To create interest and willingness and to invest time and effort in the process, is a prerequisite for success in any project. In order to obtain motivation from people in order to participate in any project, this must be meaningful on both an organizational and a personal level.
- In practice this equals possibilities for participation and more important possibilities for stakeholders to realize that they will be asked to have a voice in the process of using the European Inclusion Compass. To be in this position means real possibilities for influencing both the process and the product: a more inclusive environment on all levels.
- Starting this process begins with an open invitation addressed to staff to participate, which must be open; stating that participation means influence, and addressing the overall objective defined by the school management. In an open and transparent process, the team for the process should be set, on the basis of transparent principles, but of course, any leader is free to nudge members of staff that could be solid contributors to the process, but still it needs to be done in the open.

Reducing complexity

- Almost any issue regarding promoting inclusion holds a level of high complexity and almost always a number of related dilemmas. To prevent contributors in the process from being confused and reacting with a negative attitude, the inclusion project has to be presented in a digestive and way so to say. This implies that core issues and only core issues will be presented as focus for the process and that the process will be presented in an imaginable way for participants. Related to this it has to be cleared out what mandate will be given related to the degree of influencing the process and the end product. But also, the resources allocated to the participants for the process should be opted out as not doing this inevitably will cause confusion.
- In practice this means that school management has to plan the process very deliberately and go through the process very carefully to avoid any interference, although it will never be able to foresee everything that could happen in this process of change.
- Starting this process, school management is recommended to have a dialogue about plans for the process with an external facilitator, as this offers possibilities for questions and reflections that school management never ever even would have thought about. This kind of facilitation and supervision will be very useful, and it would be optimal if this process could continue through the process.

Securing progression

- In order to secure flow in the process a number of milestones should be considered as well as setting up a number of deadlines for the work in the different components of the process. Related to this, it is important that the participants experience, that new ground is being tread and that the project isn't just a repetition of some familiar acts from earlier in the history of the organization. Hence the process and the progress in this needs to be visualized both on the internal and the external level.
- In practice securing progress using the European Compass means that school management should be very communicative on all levels about the process. All stakeholders have to be informed about important details and main issues in the process securing progression in the project.
- Starting the process of progression implies that school management in the planning process have to think about how to get from A to Z. The desired initiary for the process must be



thought about very carefully as to where risks of detours are in the project. Again, this is an activity that school management should find support for from an external facilitator. Also, it should be stated that this process should not take place just once, rather it should be done again and again in a number of loops in order to inform and calibrate the process.

Addressing challenges

- Any process of change is connected to challenges as they are related to more or less unknown situations, choices, routines etc. For any workplace this will cause uncertainty and loss of control on different levels. But it will also be a situation with possibilities for new organizational and personal development. In a change process like this, managers in general, need to address these challenges with possible consequences of any kind. True leadership is guiding the process by openly voicing the challenges ahead.
- When school management addresses the challenges, either by talking or in writing in an honest way, it will provide the stakeholders with realistic expectations of what is at risk in the form of challenges and future changes.
- Starting the guiding process, school management or external consultants, need to establish routines supporting staff and other stakeholders in the process of change by also giving these stakeholders a voice. Critique and constructive contributions must be recognized, and viewed as resources, and hence these contributions should be considered respectfully implemented in the process.

Managing bumps

- Any process of change will meet bumps all along the way. Bumps in this context are the situations where suggestions and solutions turn out to be irrelevant, non-effective or even contra productive related to the objective for the specific inclusive project. Another phenomenon which can pop up is the formation of alliances causing productive or destructive dynamics all along. In this part of the process it is a question of giving and taking and securing motivation for continuing the process.
- In practice school management need to be alert and react proactive in order to secure positive dynamics in the process. The key to this is being sensitive, honest, communicative and securing an ongoing dialogue with all parties and stakeholders.
- Starting off with managing bumps for school management should be a supportive practice from the outset of using the European Inclusion Compass if it isn't already a part of active support from school management. For stakeholders to know how leaders react to bumps is producing a sense of security, on which school management can build new dynamics.

Showing and Supporting

- Showing the way and supporting staff and other stakeholders is essential for the relation between school management in the practice of promoting inclusion by using the European Inclusion Compass. One of the best but also most difficult ways to do this is by being a role model in the process. To walk the talk when things seem complex is promoting any process.
- In practice school management need to use feed-forward and guide participants by using former leadership experiences but also at the same time paying attention to when to back out and leave the situation for the participants to lead themselves. Starting this part of process is depending on a crucial judgement of how the process are moving according to the objectives for the project. In order to secure that 'ownership' to the project is kept alive in



the groups of participants school management needs to balance matters. And be ready to interfere any time in the process.

2.3 Process Level – Introduction

As inclusion is something that schools and educational institutions have to work with on a local level through local collaboration and decision making, the European Inclusion compass is designed as a process tool, leading the school management through the process of collaboration, co-creation and decision making with the local internal and external stakeholders. This process level is the third element of the compass and it is comprised of nine components which all represents important activities in the process of organizational change.

For a thoroughly and theoretical presentation of these nine components please read the Background Document. For a presentation on what this means on a practical level working with inclusive practice, please go to the Toolbox for the SPISEY project, which contains suggestions as to what kind of methods and materials could be used in the process of working with the European Inclusion Compass.

3. A Case Story on How to Use the European Inclusion Compass

To give an example of how to work with The European Inclusion Compass we will go through the nine process components, from establishing a *coordination group, definition of values, directions, barriers, resources, chosen pathways, implementation, process evaluation* and ending with *revised values*. The case story presented here reveals some general issues and challenges occurring in all kind of processes of change. But it must be stated once again that all processes of change are local and hence of different nature.

The case story: what was the concrete challenge that the school wanted to work with?

Our example is focused on how school management can work with a team of team-leaders in a collaborative process focused on organizational and other challenges when team-leaders must deal with inclusive values and other related values. The case presented here from a school for adolescents all in process of learning and testing out what kind of education or vocation would suit them best. The case school is newly established as is the education and the curriculum for this school combining practical and theoretical learning.

Presentation of the process using the European Inclusion Compass in a specific case story

○ Setting up a Coordination Group

In this case story, setting up a coordination group was rather easy as it was an obvious option to designate the group of team-leaders as being the coordination group. In many schools there will be a number of team-leaders with responsibility for specific areas in the organization, and in a process of change like applying the European Inclusion Compass for



organizational development, this level of competence represents a good input to the process.

So, what were the results of this activity in the pilot school?

To choose team-leaders as members of the coordinating group means that motivation for participating in the process is generic, as interest for results in the team-leaders specific field of responsibility and quality, so to say, lays in the genes. In the case story this turned out to be true as this coordination group together in this component of preparation and arranging a process with their knowledge and commitment created a precise and complex patchwork of both specific and general challenges for this school to implement inclusion as a value on all levels in the organization.



See the toolbox for inspiration on how to organize and facilitate the work

○ *Creating Values*

In the motivation letter for the 1st meeting, and as preparation for the meeting, each member of the team of leaders was asked to find one example from practice representing a good experience of social inclusion from own practice, and write a text of not more than half a A4 page. The school manager was responsible for starting this process of motivation, by addressing this assignment to the team of leaders. Another assignment for the team-leaders, as preparation for the 1st meeting, was to reflect on and define what made the example a good experience. The objective was to try and define if it was the actions from the team leaders or other people's actions, that qualified this experience as a good one. This also gave room for reflections on figuring out exactly which values defined this experience.

For the first meeting and as a start for the meeting the school manager made a presentation of different ways of thinking about values and how to define values in the local situated context. See the toolbox for inspiration. After this introduction the team-leaders shared the good experiences and had a dialogue about the content in the examples focusing on communalities and differences. In this dialogue there was a specific focus on the values related to inclusion and more the team leaders tried to create a common set of good practices based on their practical experiences. Based on this dialogue 3 – 5 most important and common values was defined during the meeting in a joint text.

So, what were the results of this activity in the pilot school?

What happened in this component was that the team-leaders by sharing stories or narratives from their individual experiences got a chance to look into each other's practice and more important what reflections and values lies behind their personal and professional choices. This kind of process triggered the team-leaders self confidence but also caused some curiosity for how other ways of dealing with inclusive challenges could be handled. To set into words what at the beginning seemed more or less specific turned out to be



experiences with many similarities making it much easier to find common ground and decide on the 3 to 5 most important values.



See the toolbox for inspiration on how to organize and facilitate the work

○ *Deciding on further Directions*

Within this activity, the team leaders took the values from the joint text and joined in a dialogue about the overall vision and goals for the further work with and implementation of the values. The work was initiated by the school manager, but it was the team leaders who made reflections and conclusions on the possibilities for reaching a successful implementation of the values.

Scaffolding this process, the team-leaders had to take into account a number of possibilities that needed to be decided upon in order to create realistic directions for future actions. The topics that they discussed were:

- Prioritized and default of what
- Short term and Long term of what
- Internal and External of what
- A specific approach and A general approach about what

So, what were the results of this activity in the pilot school?

By going through this process, the team-leaders together narrowed down the complexity that everyday practice represents, and hence the many dangers of not staying on the right track or in the direction which is agreed upon. An important outcome of scrutinizing the wide range of possibilities for directions was the choices made for realistic directions and not the 100 % idealistic ones, which in the end can cause some frustrations in the organization.



See the toolbox for inspiration on how to organize and facilitate the work

○ *Investigating Dilemmas and Barriers*

Important questions in any organizational process of change is to deal with what kind of observed or imagined barriers could cause hindrance for the process. Being a team-leader supporting the school management also encompasses competences for having a dialogue with staff about critique and skepticism directed to implementing new values and related new practices. In this case the following two questions were addressed to the team-leaders in order to shed light on hindrances, detours and possible bumps in the process of change.

- Which factors could disrupt the process of putting the chosen values in practice?
- What are the specific possibilities for overcoming the barrier which and which structural issues can be considered as barriers for putting any chosen value into practice?

So, what were the results of this activity in the pilot school?



This component of applying the European Inclusion Compass is one of the most essential but also most complicated, due to the fact that barriers apparently often ends up being the biggest challenge for changes and development of the organization. For the team-leaders in the case story this also turned out to be true. Adopting to the employee's experiences of barriers, calls for empathy and clear-sighted analysis of the situation. What people in an organization often will call barriers instead could be seen as complex dilemmas. In this concrete case, the team-leaders showed great amount of understanding of and setting into words barriers, but at the same time kept a curious and a critical perspective, and were also capable of elaborating a list of possibilities on how to deal with the barriers.

 **See the toolbox for inspiration on how to organize and facilitate the work**

Clarifying present and not present Resources

Tightly connected to the nature of barriers is of course the question of which resources is at hand for use in the process and which are not. In the case presented, as in any case, school management has to have an ongoing dialogue with team-leaders about available and needed resources. In the case presented here, the topic of resources was addressed by the question:

- What resources or which kind of support is needed for putting the chosen values into practice

So, what were the results of this activity in the pilot school?

Resources in any organization always seems to be too few and this issue generally falls back at the level of leaders like team-leaders. Which not surprisingly, also was the case for these team-leaders. On the one hand, they felt responsible for allocating sufficient resources, but on the other hand, they often felt that the resource allocation was out of their hands. In this situation the solidarity with the employees on one side and the school management and the central school authorities on the other side, produced ambivalence. This challenge was experienced as a serious threat for the team-leaders' position and satisfaction about their job function. But they also agreed about the importance of really being and acting as a team in order to support each other.

 **See the toolbox for inspiration on how to organize and facilitate the work**

Deciding on what is going to be the Chosen Pathways

After having cleared up the situation related to Barriers and Resources the team-leaders, with background support from the head of school, have to take the next and defining step which is to clarify and choose which actions could or should be taken, in order to implement the values in practice. To come this far, the case presented here, showed the importance of having a dialogue with and in-between different stakeholders involved in the process of implementing inclusive actions in the organization. To support this process the three questions below supported the process:



- What kind of actions is chosen – content - and how is the implementation – as related to time planned related to the relevant and involved stakeholders?
- What needs to be done before kickoff as related to both motivation for participating in the process as more practice related issues?
- Who in the organization and outside the organization should participate doing what in the process of implementation?

So, what were the results of this activity in the pilot school?

In many ways this activity turned out to be one of the most crucial in the process involving the stakeholders, as this was the moment where defining choices for the process was taken. One thing that the group realized in this process was that focus is needed when starting to work with social inclusion. A school cannot cover all kinds of challenges at the same time, such as smoking, absenteeism or didactic challenges, at the same time as setting up a change process with the objective to promote inclusive and inclusive practice. Hence the great challenge here was to cut the many possibilities down to what was realistic to carry out. This narrowing down process, where the team leaders listened to and made an effort to understand each other's perspectives and imagined futures, turned out to be an important quality in collaborating with both the stakeholders and the school manager.



See the toolbox for inspiration on how to organize and facilitate the work

○ *Monitoring of the Implementation process*

The process of implementation, consisting of working with the decided values, is first and foremost a question of planning what shall happen when and with who. In other words, the plan for implementation needs to be common and recognized knowledge for all involved stakeholders. During the process of implementation it is also important to keep track of what is happening and to make sure that experiences will be available after the implementation period Hence, the stakeholders involved should take notes, or on a regularly basis report in one or another kind of medium about what is happening. It could be a help to have a logbook open for all involved for taking notes on what is happening. Implementation is very much about feedback and feedforward all along the activities in the process. These actions were exactly what was decided upon in this case project.

So, what were the results of this activity in the pilot school?

It turned out that this part of the process was one of the components that needed the highest level of monitoring. In order to be able to steer through the “what, who and when”, the school manager had to be absolutely on top on what was going on in all sub-activities in this complex process. Furthermore, the implementation process gave evidence for the importance of having some kind of system for feedback and feedforward and that the number of briefings decided upon in the first place wasn't sufficient for monitoring.



See the toolbox for inspiration on how to organize and facilitate the work

Carrying through the Process Evaluation

After the process working with the implementation of the values, a process evaluation was carried out in order to keep track and make sure that the agreed values have been implemented. As mentioned above in relation to Implementation, it is important with monitoring, both during and after the implementation. Evaluation is a shared responsibility for all participants, but team-leaders together with the school manager of course has the main responsibility for the process evaluation. In the case presented here, local experiences using a specific way of evaluation showed productive as the template for monitoring the process of change. In the larger picture, meaning not just the component Implementation but the whole process of going through all 9 components of the Inclusion Compass; from creation of values to the implementation. In this case example a well-known tool for process evaluation was used by the team-leaders together with the school manager, because it was considered important to use an evaluation tool that most of the involved were familiar with.

So, what were the results of this activity in the pilot school?

The process evaluation turned out to be a complicated process due to the fact, that there seemed to be a number of different conceptions of what had happened in the process of implementation. According to what function or role the different professionals have had, the impression of success or failure for implementation differed. This meant that headmaster and the team-leaders had to take the role of being translators and mediators in the process in order to produce a common and recognizable picture of realities and to collect and validate actions taken all along in process.



See the toolbox for inspiration on how to organize and facilitate the work

Revised Values

With the use of this ninth component in the European Inclusion Compass the case example presented here ended by revising the values agreed upon in the first places to a revised set of values with some new added values. This revised number of values encompassed new insights and experiences made in the process of working with the components in this circular process. . But as the case revealed, this was also the start for a new process of change in the organization which was not always that easy but the positive issue here was that all stakeholders had been through the process together and all have had a voice in the process, and felt involved.

So, what were the results of this activity in the pilot school?

It turned out that the process of using the European Inclusion Compass had a wide range of results on an organizational and on a personal level. Most important was of course that the values after the process was updated and for all stakeholders this was regarded as a positive



issue as the school now could communicate about these values on both an internal and an external level. Another benefit from the process and now having agreed upon a revised set of values was that all in the organization felt committed to these values as they so to say experienced an ownership to the 'new'. For the school manager and the team-leaders having revised the values motivated for further activities promoting inclusion.



See the toolbox for inspiration on how to organize and facilitate the work

4. The importance of the context for using the compass

The reason for presenting this case example is to show how- and give inspiration for using the European Inclusion Compass. But it should be repeated here that using the compass, as using any supportive analytic approaches or concepts, means incorporating local and defining realities which cannot and should not be put aside. Instead these variations should be driving factors in the use of the compass.

Another important issue at the core of this case presentation is the fact that any school management would benefit from support of a neutral 'outsider' such as an external consultant or a facilitator , so that the school manager is not seen as the "change manager" that wants the others to change, but as a participant being part of the changes in the same way as the other stakeholders.. This supportive resource will provide any school management with a stronger voice in the organizational narrative, which these days is so important for the survival of any school, organization or institution.