



## PARTNERSHIPS FOR PATHWAYS TO HIGHER EDUCATION AND SCIENCE ENGAGEMENT IN REGIONAL CLUSTERS OF OPEN SCHOOLING

### 7.4

### Open Schooling Advocacy Toolkit for Educators



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 824430.

## Project Details


Acronym:	<b>PHERECLOS</b>
Title:	PARTNERSHIPS FOR PATHWAYS TO HIGHER EDUCATION AND SCIENCE ENGAGEMENT IN REGIONAL CLUSTERS OF OPEN SCHOOLING
Coordinator:	<b>KINDERBURO UNIVERSITAT WIEN GMBH (KUW)</b> , Austria
Reference:	824630
Type:	Coordination and Support Action (CSA)
Program:	HORIZON 2020
Theme:	Open schooling and collaboration on science education
Topic-ID:	Topic SwafS-01-2018-2019
Start:	01 October 2019 – 30 September 2022
Duration:	36 months
Website:	<a href="http://www.phereclos.eu">www.phereclos.eu</a>
Consortium:	<b>KINDERBURO UNIVERSITAT WIEN GMBH (KUW)</b> , Austria <b>SYNYO GMBH (SYNYO)</b> , Austria <b>UNIVERSITAET INNSBRUCK (UIBK)</b> , Austria <b>UNI WERSYTET SLASKI (UNI SLASKI)</b> , Poland <b>UNIVERSITAT WIEN (UNIVIE)</b> , Austria <b>EUROPEAN SCHOOL HEADS ASSOCIATION (ESHA)</b> , Netherlands <b>KOBENHAVNS UNIVERSITET (UCPH)</b> , Denmark <b>STICHTING INTERNATIONAL PARENTS ALLIANCE (IPA)</b> , Netherlands <b>SNELLMAN-INSTITUUTTI RY (SNELLMAN)</b> , Finland <b>POLITECHNIKA LODZKA (TUL)</b> , Poland <b>UNIVERSIDADE DO PORTO (UPORTO)</b> , Portugal <b>S.I.S.S.A. MEDIALAB SRL (MEDIALAB)</b> , Italy <b>UNIVERSIDAD EAFIT (EAFIT)</b> , Colombia <b>ASOCIATIA UNIVERSITATEA COPIILOR (UNICO)</b> , Romania <b>TEACHER SCIENTIST NETWORK LBG (TSN)</b> , United Kingdom

## Deliverable Details

Number:	<b>D7.4</b>
Title:	<b>Open Schooling Advocacy Toolkit for Educators</b>
Lead beneficiary:	IPA
Work package:	WP7
Dissemination level:	PU
Nature:	O
Due date:	31 July 2022
Submission date:	<b>28 July 2022</b>
Authors:	<b>Eszter Salamon, IPA</b> <b>Luca László, ESHA</b>
Contributors:	All partners
Reviewer:	<b>Karen Pesjak-Brownlee, UIBK</b>

### Version History:

Date	Version No.	Author	Notes	Pages (no.)
17.05.2022	0.1	Eszter Salamon	Initial structure	5
27.06.2022	1.0	Eszter Salamon, Luca László	First final text version for review	23
07.07.2022	2.0	Eszter Salamon, Luca László	Modification according to Reviewer's comments	23
07.07.2022	3.0	Eszter Salamon, Luca László	Finalisation after design	59

	<p>This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 824630</p>	<p><b>Disclaimer:</b> The content of this report represents the views of the author only and is his/her sole responsibility. The European Commission does not accept any responsibility for use that may be made of the information it contains</p>
---	---	---



# Open Schooling Advocacy Toolkit for Educators

-  [www.phereclos.eu](http://www.phereclos.eu)
-  [office@phereclos.eu](mailto:office@phereclos.eu)
-  [@PhereclosEU](https://www.facebook.com/PhereclosEU)
-  [@PhereclosEU](https://twitter.com/PhereclosEU)



## **PHERECLOS**

### **PARTNERSHIPS FOR PATHWAYS TO HIGHER EDUCATION AND SCIENCE ENGAGEMENT IN REGIONAL CLUSTERS OF OPEN SCHOOLING**

#### **Consortium**

KINDERBURO UNIVERSITAT WIEN GMBH (KUW), Austria – Coordinator  
SYNYO GMBH (SYNYO), Austria  
UNIVERSITAET INNSBRUCK (UIBK), Austria  
UNI WERSYTET SLASKI (UNI SLASKI), Poland  
UNIVERSITAT WIEN (UNIVIE), Austria  
EUROPEAN SCHOOL HEADS ASSOCIATION (ESHA), Netherlands  
KOBENHAVNS UNIVERSITET (UCPH), Denmark  
STICHTING INTERNATIONAL PARENTS ALLIANCE (IPA), Netherlands  
SNELLMAN-INSTITUUTTI RY (SNELLMAN), Finland  
POLITECHNIKA LODZKA (TUL), Poland  
UNIVERSIDADE DO PORTO (UPORTO), Portugal  
S.I.S.S.A. MEDIALAB SRL (MEDIALAB), Italy  
UNIVERSIDAD EAFIT (EAFIT), Colombia  
ASOCIATIA UNIVERSITATEA COPIILOR (UNICO), Romania  
TEACHER SCIENTIST NETWORK LBG (TSN), United Kingdom

#### **Authors**

Eszter Salamon, IPA  
Luca László, ESHA

#### **Contributors**

All partners



#### **Reviewer**

Karen Pesjak-Brownlee, UIBK



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 824630

**Disclaimer** | The content of this report represents the views of the author only and is his/her sole responsibility. The European Commission does not accept any responsibility for use that may be made of the information it contains.

# INTRODUCTION

The implementation of Open Schooling as a strategy requires a process of institutional learning and a fundamental change in how schools are perceived by various stakeholders. This Toolkit for Educators – be them school professionals, non-formal educators, or informal educators like parents or the students themselves – is designed to support this change. However, this is not a linear process but rather an adventure. Different people will start from different harbours and will have diverse routes to success as well as different aims. When the team was designing the Toolkit, we decided to use an adventure book format for delivering it to the reader.

You can read it from cover to cover, you can also browse its pages, but we are offering you various routes depending on your interest. You will see that after certain sections there are questions recommending you to set sail to another part of the Toolkit. This is the reason why we also chose the A5 format.

If you print the pdf, it will become a book that is easy to navigate. If you are reading it on the screen, the recommendations to set sail to another chapter are interactive, so you can simply click on them.

**Happy sailing!**



## WHO IS THIS TOOLKIT FOR?

(Policy) advocacy is the process of negotiating and mediating a dialogue through which influential networks, opinion leaders, and, ultimately, decision makers take ownership of your ideas, evidence, and proposals, and subsequently act upon them.

*(Eóin Young & Lisa Quinn, 2012)* <sup>[1]</sup>

This toolkit is for those core stakeholders who wish to improve education provisions locally by making the school they have a stake in open or more open than before. You are likely to assume that in most cases the initiative comes from the school leader – who needs to advocate their staff, parents, students and the financing authorities for such changes – or a teacher – whose primary advocacy target will be the school leader and colleagues, but also parents. But practical experiences show open schooling activities are more often initiated by non-formal education providers, parents or local communities. It is not unheard of that the students themselves advocate for a more open school.

Thus, in this toolkit we are offering ideas, guidance and tools for all of these stakeholders to support their successful advocacy work for (more) open schools, and subsequently more inclusive quality education.

## WHY OPEN SCHOOLING?

You have most probably thought you should improve education for some students whose needs are not provided for in a traditional school. In fact, if you consider this, most probably it is most or all students whose needs are not met. Unfortunately, you are not alone.

- The World Bank has reported about the global learning crisis: a growing number of students attending school, but not acquiring basic skills;
- In Europe PISA results have been declining and it is a warning sign regardless of the questions raised around PISA;
- The EU has set overall goals in education that were to be met by 2010 and then by 2020 without full success;
- There is a growing disappointment in school as an institution all over the world that has only increased during the school closures of 2020–22.

Open schooling has been promoted as an approach that creates an engaging environment for children's learning while strengthening links to local communities. Local expertise and experience incorporated into learning at school and making links to the real world offers ways to learn more meaningfully and leads to better motivation of learners, but also of teachers. Open schooling brings the arts element into STEM learning in a natural way, and thus paves the way for higher levels of STEAM competences.



## OUR ANSWER

Non-formal education providers play a very important role in successful open schooling programmes being the interface between the community and school – given that they often are more deeply embedded in the local societal context than formal education providers – and have the pedagogical expertise to engage with the professionals at school more easily than informal educators with non-educational background.

In the PHERECLOS project, 15 partners from different European countries and one non-European one, have come together to promote open schooling and the benefits of such approaches in the STEAM domain, and to call attention to the crucial and possible coordination role of non-formal education providers, especially Children's Universities.

The work done in the PHERECLOS project is based on the science capital concept, building on the sum of all the science-related knowledge, attitudes, experiences and resources that an individual builds up through their life. The concept, developed at King's College London identifies the elements of a person's science capital making it clear that it is built everywhere and at all times, making the case for the collaboration among the learning venues: the home, the community, the local informal and non-formal learning provisions and possibilities, and the school.

PHERECLOS has successfully used the Hexagon Tool to support implementation and advocacy at all stages from planning to assessment and improvement.

[If you are interested in the model, set sail to p. 34](#)

## ARE YOU A SCHOOL LEADER?

If you are the leader or a member of the leadership team of the school, the quality of education provided by your school as well as its inclusiveness is not only your responsibility, but most probably also your greatest concern. You may have already found Open Schooling to be an important part of the solution. You need to advocate your colleagues, parents, your supervisory authority, but also students and your open schooling partners to arrange the best for the students of your school. As part of this work, you do not only need to convince them, but engage them in making the right decisions together. There are several elements that need to be considered (real needs, quality management, financial provisions, staff effort, etc.) and this Toolkit is offering support for most of them.

*Is your school not an open school yet?*

**set sail to p. 13** – [Newcomers to OS](#)

*Do you want to do more?*

**set sail to p. 14** – [For experienced sailors](#)

*Do you think it is not possible in your school?*

**set sail to p. 15** – [In rigid systems](#)

## ARE YOU A TEACHER?

If you are a teacher, you are most likely a teacher of one or more science subjects. You may also be a teacher of Science as a complex school subject, but that is not yet typical in schools. It may also be the case that you are an Arts teacher, and you want to work more collaboratively with your colleagues in the STEM field. You believe that Open Schooling should be part of your school's daily life, and thus you need to engage with your school leader, colleagues, the parents and students, but also current and/or potential open schooling partners for this. There are several elements that need to be considered (real needs, quality management, financial provisions, staff effort, etc.) and this Toolkit is offering support for dealing with most of them.

*Is your school not an open school yet?*

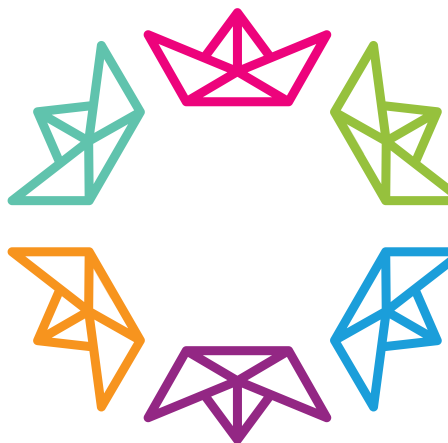
**set sail to p. 13** – [Newcomers to OS](#)

*Do you want to do more?*

**set sail to p. 14** – [For experienced sailors](#)

*Do you think it is not possible in your school?*

**set sail to p. 15** – [In rigid systems](#)



## ARE YOU A PARENT OR PARENT LEADER?

As a parent, you are responsible for providing education that helps your children reach their full potential. This means that you have an obligation to be engaged with the school(s) they attend, but also with other parents as school provides one of the most important communities your children learn from and at. You have most probably found some interesting non-formal STEM/STEAM initiative that you believe not only your child, but also the school community would benefit from. This Toolkit offers you support to assess what is possible and engage with the school leader, teachers, the school authority and also with the non-formal provider to make this a reality in everyday school life (and not just to be arranged for a single occasion).

*Is your school not an open school yet?*

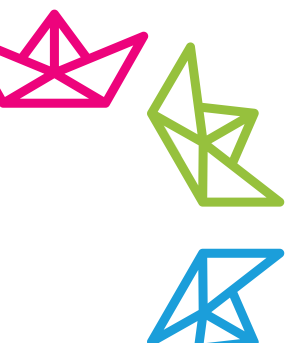
**set sail to p. 13** – [Newcomers to OS](#)

*Do you want to do more?*

**set sail to p. 14** – [For experienced sailors](#)

*Do you think it is not possible in your school?*

**set sail to p. 15** – [In rigid systems](#)



## ARE YOU A NON-FORMAL EDUCATION PROVIDER?

You have a great STEM/STEAM programme or a number of them. You believe that this is exactly what children at the school you want to engage with need. You may find it challenging to find a way to implement it in the school, and it is even more likely that it is difficult for you to make it part of regular school activities linked to curriculum, not only a one-off extracurricular event. This Toolkit will help you understand the school more to be able to discuss concerns they may have. You will find tools to help discuss school budgets, safety and quality concerns, teacher workload and similar topics.

*Do you want to do more?*

**set sail to p. 16** – [Your open schooling offer](#)

*Do you think it is not possible in schools locally?*

**set sail to p. 15** – [In rigid systems](#)

## ARE YOU A SCHOOL STUDENT REPRESENTATIVE?

Being a student representative is not only an honour, but also a great responsibility. You need to make the voice of students whose needs are very different from yours heard, and represent them in a way that makes adults – your school head, your teachers, parents – understand that you are a competent, responsible person. Even the first part is not easy. Do you remember what you really wanted to change at school when you were 3–4 years younger? You may have peers who struggle with subjects you find easy and may thrive in classes you find very challenging. You surely have experiences with some fun learning activities outside of school. If you read this toolkit, you have decided to make that experience part of everyday school activities for yourself and other current as well as future students of your school.

*Is your school not an open school yet?*

**set sail to p. 13** – [Newcomers to OS](#)

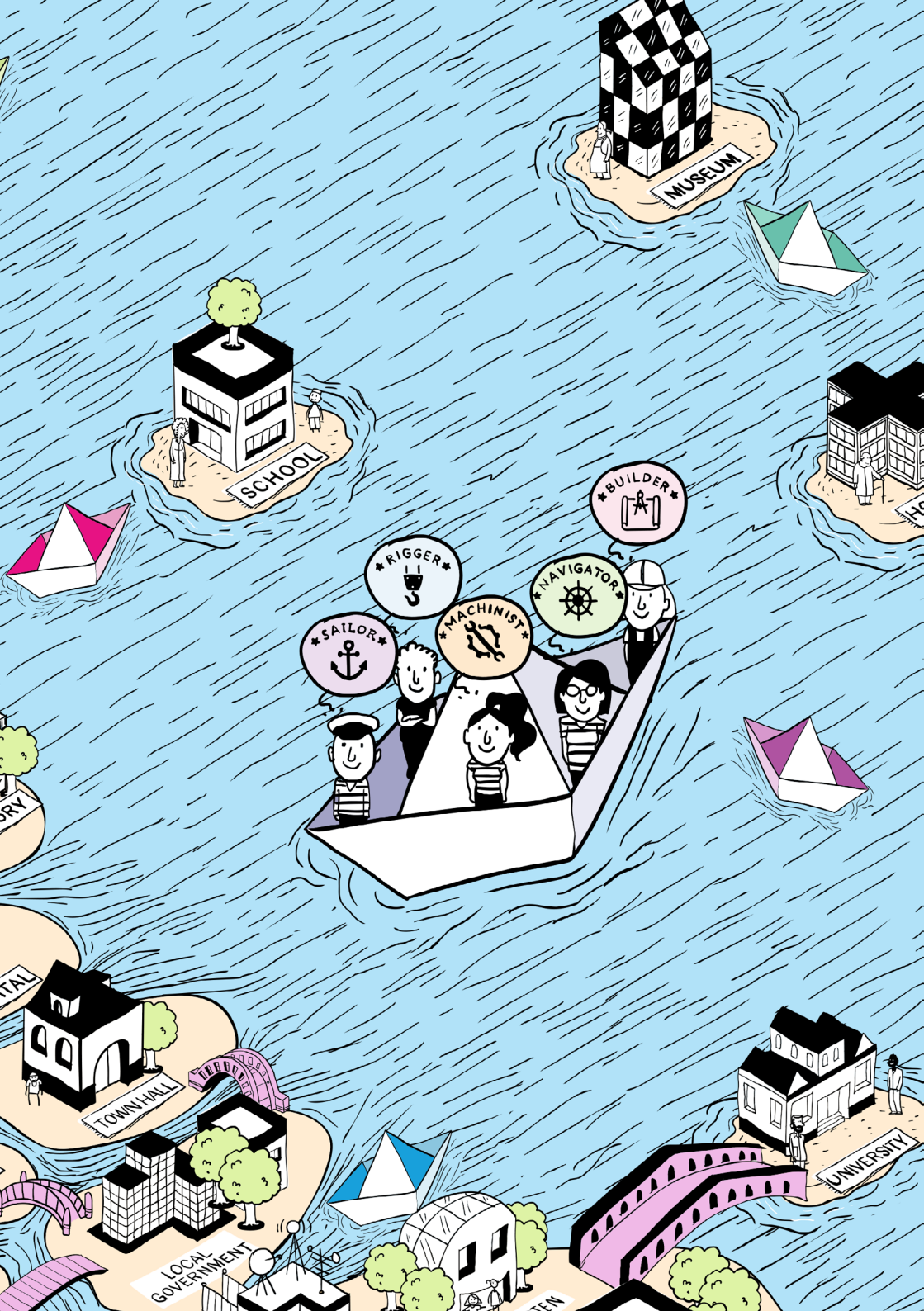
*Do you want to do more?*

**set sail to p. 14** – [For experienced sailors](#)

*Do you think it is not possible in your school?*

**set sail to p. 15** – [In rigid systems](#)





# NEWCOMER TO OS



In this section, we are providing you with tools for advocacy in schools that have no or very little experience with Open Schooling. The section covers the main concerns regularly raised. While planning open schooling is a process with all the steps below necessary, you may not need support with each of them. Choose the ones you are interested in and start sailing.

[Needs analysis](#) – **set sail to p. 18**

Assess the here and now

[Current network](#) – **set sail to p. 20**

[Stakeholders](#) – **set sail to p. 22**

[Advocacy planning](#) – **set sail to p. 24**

[Exploring the environment](#) – **set sail to p. 26**

[Engaging parents](#) – **set sail to p. 39**

[Engaging students](#) – **set sail to p. 41**

[Training your teachers](#) – **set sail to p. 45**

[Safeguarding and rights](#) – **set sail to p. 27**

[Financial provisions](#) – **set sail to p. 28**

[Time management](#) – **set sail to p. 29**

[Assessment](#) – **set sail to p. 30**





## FOR EXPERIENCED SAILORS



You have decided to further explore the seas of Open Schooling. You may have detected new, unsupported needs. You may have decided to revisit what you offer and see if there are new opportunities that fit your situations better. You can also think about supporting key people at other schools in collaborating with you and/or build their own Open Schooling system. Choose the topics you are interested in and start sailing. You may also find other sections that are interesting and relevant for you.

[Assessment](#) – **set sail to p. 30**

[Engaging parents](#) – **set sail to p. 39**

[Engaging students](#) – **set sail to p. 41**

[Training your teachers](#) – **set sail to p. 45**

[Scouting for new partnerships](#) – **set sail to p. 32**

[Adding and subtracting](#) – **set sail to p. 33**

[Coaching other schools](#) – **set sail to p. 35**

## IN RIGID SYSTEMS



Packed curriculum, little or no autonomy, restricted access for external education providers to schools due to legislation, not flexible enough teachers, parental demand for traditional teaching – a number of factors that make Open Schooling more difficult to implement. But it is never impossible. For successful internal advocacy, you need to know all the possible solutions. And at the same time, you can also advocate for autonomy as a necessity for quality inclusive education.

[Getting acquainted with your boundaries](#) – **set sail to p. 36**

[Advocating for school autonomy](#) – **set sail to p. 37**

[Outside of the school](#) – **set sail to p. 38**

[Engaging parents](#) – **set sail to p. 39**

[Engaging students](#) – **set sail to p. 41**

[Training your teachers](#) – **set sail to p. 45**

[Engaging with local communities](#) – **set sail to p. 43**

## YOUR OPEN SCHOOLING OFFER



As a non-formal education provider, you often have to make the case for your activities in the school, convincing the school leader or individual teachers about its usefulness for the students of the school. For this, you need to know what you offer well, but that is not enough. You also need to know how schools work, what is possible for them and what is not – while pinpointing those things that they feel impossible, but you can help them make it a reality. If you are well prepared and can be emphatic with the school's representatives, you are more likely to succeed. However, non-formal providers often need to prove their professionalism. While the perception of a teacher's professionalism is supported by simply the fact they are employed by the school, non-formal providers often need to put a lot of effort into proving their expertise.

[Needs analysis](#) – **set sail to p. 18**

[From project to systemic implementation](#) – **set sail to p. 47**

[Packaging your Open Schooling product well](#) – **set sail to p. 49**

[Training your teachers](#) – **set sail to p. 45**

[Coaching other schools](#) – **set sail to p. 35**



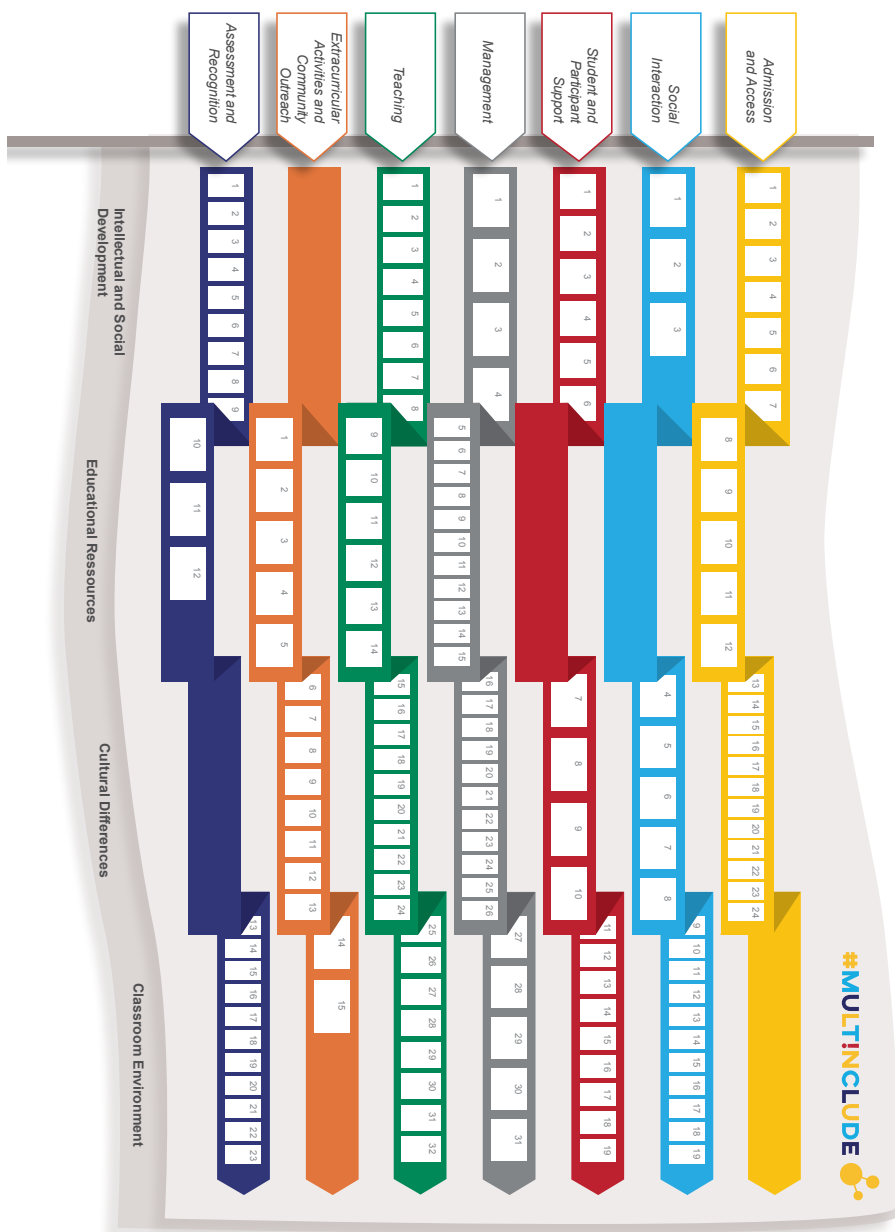
## NEEDS ANALYSIS



In order to justify that a new Open Schooling programme should be implemented in the school context, you need to analyse current realities. You can start with secondary data, such as exam results, but you can also collect primary data from your main stakeholders, especially students, teachers and other school staff, and families.

We are offering an easy-to-use tool that also makes the case for your Open Schooling plans offering an attractive visual representation of the areas where you need to improve. The tool (developed by a consortium that is represented in PHERECLOS), called the [MultInclude Matrix](#) <sup>[2]</sup> was developed with an overall inclusion goal in mind, but by choosing the areas you want to improve you can finetune the outcomes to STE(A)M and Open Schooling. If you use the online version (only available in English), you can make your case stronger by comparing your results to that of others.





Go to the next page for next steps.

## ASSESS THE HERE AND NOW



### Current network

One of the most crucial elements of preparation for advocacy and also for new Open Schooling activities is the analysis of the local education environment you wish to influence with your advocacy efforts, namely

- identifying the influential networks, opinion leaders and decision-makers mentioned in the definition of advocacy, and
- identifying local conditions relevant in advocacy.

**Advocacy is targeting people, not institutions.** Similarly, you usually wish to target your advocacy work to a limited local context. Global advocacy is more or less impossible, and given that you are advocating on the level of individuals within a target group, the more specific your context is, the easier it is to plan advocacy. In simpler terms, you need to explore and understand the **local context** for Open Schooling. There might be similar situations in different local contexts, but the closer you focus, the more solid points you can find for your advocacy. In the case of Open Schooling, this local approach is even more important. Every context is different with regards to demographics, student needs, accessibility challenges, motivated local stakeholders, but also the Open Schooling offer available (and physically reachable).

In PHERECLOS, the consortium used a simple SWOT analysis for exploring local conditions impacting advocacy. The strength and weaknesses of the institution the advocate belongs to – be it a school, a non-formal education provider or even a group of

informal educators – have a major impact on advocacy actions. We want to show our strength and hide our weaknesses, but the latter also needs to be considered carefully as neglecting or completely hiding them may backfire and undermine credibility. At the same time, a careful exploration of opportunities and threats greatly increases the chances of success. Both may need advocacy actions. While exploiting opportunities can be the basis of a successful advocacy plan, eliminating some of the threats might be an important goal in your advocacy plan.

*Go to the next page to see what you can do to prevent threats and utilise opportunities.*

## Swot Analysis





## ASSESS THE HERE AND NOW

### Stakeholders



One of the greatest challenges to advocacy activities is identifying and understanding the target audiences. At the planning stage you need to consider that policy and decisions in general are made by people, not institutions. Therefore, advocacy activities must be targeted at individuals. Successful advocates carefully analyse their target audience to ensure their efforts and resources are directed in the most efficient manner.

When making the first steps in identifying and understanding the target audience, it might be useful to create a distinction between primary and secondary audiences. In other words, advocates need to answer the questions:

- *Who has the authority to make the changes that need to be made?* and
- *Who influences them?*

The primary audience includes decision makers with the authority to directly affect the outcome of the advocacy goal – be it policy change or other crucially important factors like funding. These are individuals, for example, who must approve a change of legislation. The secondary audiences are individuals and groups that can influence these decision makers. The opinion and actions of the latter group of individuals are important in achieving the advocacy objectives, since they have the potential to affect the opinions and actions of the decision makers – both as supporters or as adversaries. However, in

open schooling, it is rare to experience real opposition. However, there can be fear and reluctance, mostly due to a lack of experience and/or information.

For this reason, in PHERECLOS, we have been using a simplified structure to visualise stakeholder groups. LEC partners have used this model in identifying their target audiences when planning advocacy actions. We call them stakeholders as they actually have a stake in your wish to implement an Open Schooling programme. While identifying the groups, you also need to identify these diverse stakes.

### Stakeholder Map: Who Needs What?



*Go to the next page to find next steps in advocacy planning.*

## ASSESS THE HERE AND NOW

### Advocacy planning



For each target group (and in the case of very influential people e. g. a minister or mayor, each target) you can make decisions on which quadrant they belong to and what tools can be used for engaging them answering a few simple questions:

#### *1. What do they know about Open Schooling in your context?*

If you provide too basic information, that may be redundant and you lose their interest. If you do not ensure a common ground, it can cause problems later on.

#### *2. What beliefs may influence them in supporting your goal?*

How do they see the goal of schools? Do they see the benefits of student-centred methods? Do they believe in shared leadership? Do they like to control things? Do they truly support child rights? Do they know the limits of the schools' responsibility? – you can ask these questions and similar ones here.

#### *3. What personal interests can have an impact on their support?*

Do they have children who may participate? Are they up for re-election? Could it offer media coverage for them? – and other similar factors can have major influence.

#### *4. What can be the impact of their support on your goals?*

It is important to understand how their direct support can help you in implementing your Open Schooling programme, but it is equally important to see what might be the impact of their not doing anything or directly acting against your goals.

*Do you want to plan for advocacy action locally ?*

**set sail to page 43** – [Engage with local communities](#)

*Do you want to plan for policy advocacy?*

**set sail to the next page**



## EXPLORE THE ENVIRONMENT



When designing advocacy work at your own level, it is of utmost importance to explore the policy environment to understand:

- the enabler in policy that might be utilised;
- the boundaries set by policy;
- european and international policy recommendations that can be used to change policy in the immediate environment
- any discrepancies between legislative strands; especially the (mis)alignment of education/open schooling policies and international treaties ratified by the country.

In preparation for supporting the establishment and implementation of the LECs, [a policy inventory was created in PHERECLOS](#) primarily focused on the LEC countries (Austria, Colombia, Finland, Italy, Poland and Portugal), but also on countries that have been the project's secondary target for upscaling, already participating in the project, namely Denmark, the Netherlands, Romania and the UK. <sup>[3]</sup>

## SAFEGUARDING AND RIGHTS



The right to an education that is best for a child is a basic right ensured by all countries ratifying the UN Convention on the Rights of the Child. As it is the case with all human rights, children's rights are subject to an internal hierarchy. The protection of life, similarly to general human rights law, overrides all other rights. It appears, however, that national and regional regulators tend to often only consider the right to safety. As more and more countries implement a purely risk-prevention focused approach, they lose sight of the importance of balancing, and indeed respecting, children's rights. This prevalent approach often makes Open Schooling more difficult with legislation in place that prevents children from being outside of school or external people entering school premises. Even if there is no legislation, some school leaders seem to implement such approaches not understanding that this violates other rights of their students. An Open Schooling advocate, thus, must advocate for **risk mitigation** as opposed to pure **risk prevention**. A risk mitigation approach can achieve a **balance** between competing children's rights while also minimising risks that children face in Open Schooling activities.

*If you want to advocate for Open Schooling activities,*  
**set sail to page 38** – [Outside of the school](#)

*If you want to prepare school staff for Open Schooling activities,*  
**set sail to page 45** – [Training your teachers](#)

*If you want to influence policy making and legislation,*  
**set sail to page 24** – [Advocacy planning](#)



Financial provisions for open schooling need to be designed in a sustainable way, and they need to ensure that open schooling activities do not create any extra financial burden for families. These are prerequisites of inclusive education provisions. This means that legislation has to be in place that either gives schools appropriate and flexible budgets to finance their activities, including open schooling ones, or there needs to be a fund available for other open schooling actors to provide their services free for the school. We need to consider it a reality that successful pilots are only sustainable if their operating costs are provided for.

For this, your strongest argument is child rights legislation. The fundamental rights of children to free, quality education are enshrined in legislation in all European countries through the UN Convention on the Rights of the Child. The European Union made a further commitment to deliver on the right to education and in particular on access to free compulsory education in the EU Charter of Fundamental Rights of the European Union in 2012. This offers the legal basis to approaching the financing of open schooling and innovation in STE(A)M education. When implementing open schooling programmes, there is a need to ensure there is no financial burden on families thus it has a positive impact on equity and inclusion.

# TIME MANAGEMENT



We don't have time for it – this is probably the most often heard argument against introducing anything new. Open Schooling activities might be time consuming to plan, but in the long run they make the lives of school professionals who try to cater for diverse learner needs easier.

In advocacy for Open Schooling you can use a number of tools for gaining support:

- make the case for including time spent on organising and managing Open Schooling activities in the time sheets of school staff;
- apply time use charts to visualise time spent on various activities, and to explore what can be changed or eliminated to make space for Open Schooling;
- engage with the learners and their families for redesigning the school day and school week together – use surveys to explore their availability and preferences;
- celebrate success, share inspiring examples that have worked in contexts similar to yours;
- holidays are for relaxing, but long summer school breaks can be an opportunity to introduce Open Schooling activities – especially if they are accompanied by offering heat shelter or free meals for those in need.

*If you want to know more about engaging with parents,*  
**set sail to page 39** – [Engaging parents](#)

*If you want to know more about engaging your students,*  
**set sail to page 41** – [Engaging students](#)



## ASSESSMENT



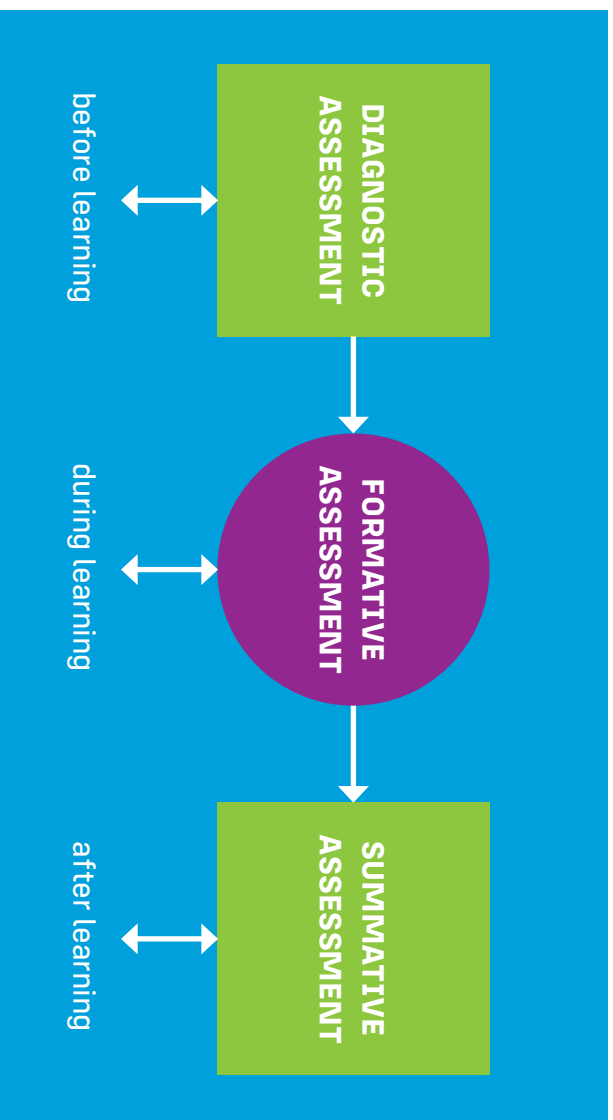
Assessment is an important element of implementing any activities at school, including Open Schooling. Assessment in this case is two-fold, and both serve advocacy purposes.

One aspect is the assessment of the programme. It needs to be done regularly to see if it is still appropriate, what needs to be changed or improved, and to prove that it is worth the investment. To do this, the best is to go back to the original needs assessment, and verify the programme you are implementing against that.

One of the most important elements of assessing an Open Schooling programme is to verify student learning and to prove the validity of the programme against curricular goals. For this, Open Schooling programmes should include 3 stages of assessment: diagnostic, formative and summative.

- diagnostic assessment serves a clear picture at the beginning of a programme to see what students know and what their development needs are – this can also serve as an advocacy tool to verify needs;
- in the formative stage, during the programme, assessment is used to support and incentivise learning, assessing learners against their initial knowledge and general abilities;
- summative assessment – measuring learning against external benchmarks such as curricular goals – can serve as a proof of the effectiveness of your programme as compared to traditional in-school methods in your advocacy.

## Types of assessment



To learn more about needs assessment  
set sail to p. 18 – [Needs analysis](#)

## SCOUTING FOR NEW PARTNERSHIPS



The transformation of the educational landscape, the growing diversity of manifest needs, together with other factors, such as the impact of a global digital education market has resulted in an increasing recognition of the importance and relevance of learning outside formal institutions. Globally, we are witnessing a move from traditional educational institutions towards mixed, diverse and complex learning landscapes in which learning occurs through a variety of educational institutions – both formal and non-formal – and non-institutional providers. There is a need for approaching learning as a continuum, in which schooling and formal education institutions interact more closely with other, less formalised educational experiences from early childhood throughout life. While the role of formal education is to provide stability, non-formal providers are offering varied spaces, times and relations for learning to take place, and together they can establish a network of learning spaces where formal, non-formal and informal spaces of learning interact and collaborate for better learning outcomes.

However, it is the school's responsibility to choose their partners in a way that serves their students best. For this, it is important to match possibilities, needs and offers.

*To learn more about needs*

**set sail to p. 18** – [Needs analysis](#)

*To learn more about possibilities*

**set sail to p. 20** – [Current network](#)

*To learn more about the Open Schooling offers*

**set sail to p. 49** – [Packaging your offer](#)



The Open Schooling programme of a school needs to be assessed and updated regularly. In your advocacy work, it is important to properly engage all Open Schooling stakeholders by making them part of a shared decision making process to ensure that

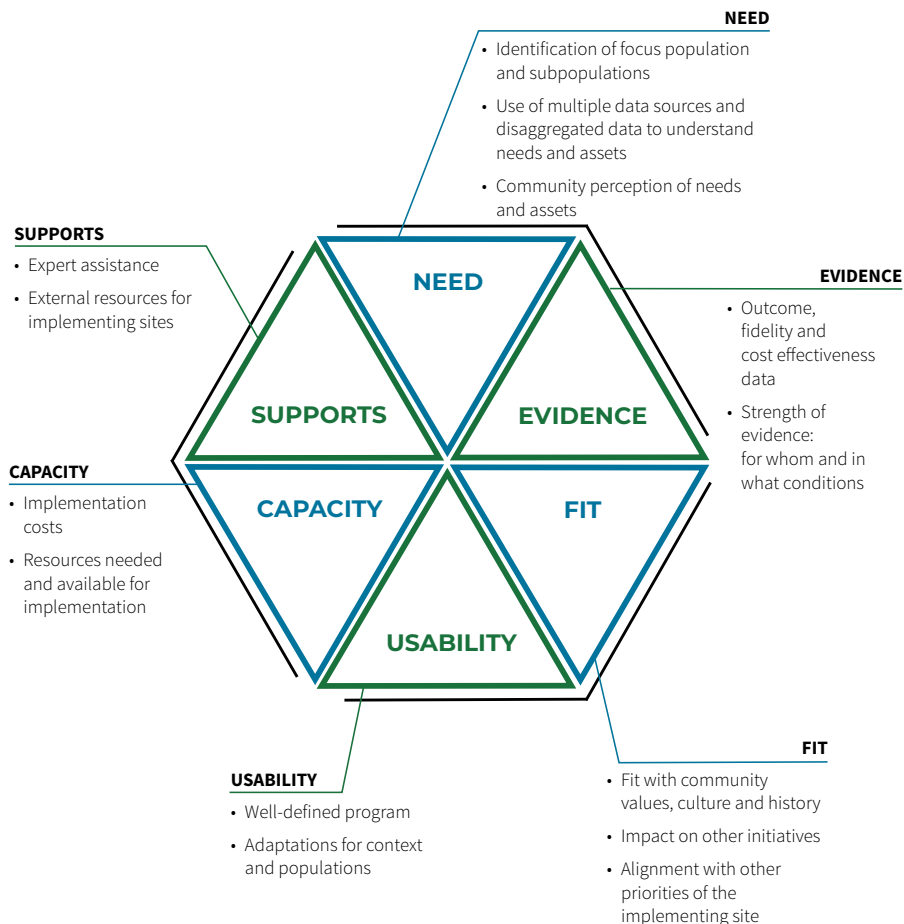
- everybody, including your existing Open Schooling partners will help you to scout for new solutions in case of new needs emerging;
- it becomes a joint decision, owned and understood by all, to stop a certain programme if it doesn't serve the students anymore.

In PHERECLOS, the Hexagon Tool has been used to monitor implementation. It has proven to be a useful tool for the continuous monitoring of Open Schooling activities in other contexts, too. When advocating for adding or stopping certain Open Schooling activities it is a useful structure to make the case for each programme in an evidence-based way. This needs to be strongly linked with the regular assessment of the programme as well as the learning of students.

# The Hexagon: An Exploration Tool

## The Hexagon: An Exploration Tool

The Hexagon can be used as a planning tool to guide selection and assess the fit and feasibility of potential programs and practices for use. It includes three **program indicators** and three **implementing site indicators**.



*To learn more about assessment,*  
**set sail to p. 30 – [Assessment](#)**

## COACHING OTHER SCHOOLS



There are many schools that are newcomers to Open Schooling. You can help them make up their mind by advocacy support. Share your success, but also the challenges you had to overcome to be a truly open school.

Research has clearly shown that amidst the necessary transformation of schools and changing environment around it, one of the main enablers is peer-to-peer support, and coaching and mentoring programmes have proven to help teachers in successfully changing their practices, but also preventing burnout, disillusionment and abandoning the profession.

Coaching, however, needs investment especially of time that school professionals are usually short of. Thus, it is important to understand that coaching other schools is also an advocacy tool. Many successful Open Schooling programmes are based on school-to-school collaboration, often without any third party involved. Thus, coaching other schools may help you widen your Open Schooling offer while helping the other school to meet their students' learning needs, too.

*To learn more about schools that have not yet implemented Open Schooling programmes*

**set sail to p. 13** – [Newcomers to OS](#)

## GET ACQUAINTED WITH YOUR BOUNDARIES



Boundaries can be legislative or physical, and exploring them is crucial for successful open schooling programmes.

For legislative boundaries, it is important to have a clear picture of what legislation actually limits, and what boundaries are imaginary (or mostly illegal) when restrictions are introduced in school level codes of conduct or similar documents.

Physical accessibility is a major factor in equitable education provisions. It is ensured by anticipating and mediating social/ environmental barriers to enhance access for all learners. Most education systems require schools to be barrier free for various special needs. This spirit and approach need to be maintained when designing and implementing open schooling initiatives. While courses, technology, and student services are often designed for the narrow range of characteristics of the „average“ student, the practice of universal design in education (UDE) considers people with a wide range of characteristics for all educational products and environments. UDE goes beyond accessible design for people with disabilities to make all aspects of the educational experience more inclusive for students, parents, staff, and other stakeholders with a great variety of characteristics. Accessibility needs to be in the heart of designing open schooling programmes, both in and outside the school building.

*To learn more about boundaries*

**set sail to p. 26** – [Explore the environment](#)

## ADVOCATE FOR (MORE) SCHOOL AUTONOMY



Open schooling has proven to be more successful when combined with stakeholder engagement in decision making. Teachers, parents and the students themselves are the first groups to engage, but other local stakeholders that can become part of the open schooling environment are also key.

Open schooling is per definition a local collaboration between the school and other stakeholders. To establish such relationships, the school needs to have a certain level of autonomy to decide on such partnerships, allocate necessary resources and arrange their activities accordingly. What is more, open schooling initiatives are great testbeds for curricular experimentation, and thus a respective possibility for autonomous decision making is also desirable. Autonomy is to be accompanied by clear accountability settings by stakeholder groups.

There is a wide variety of stakeholders that are considered relevant in STE(A)M education. As a general rule, research shows, engagement into developing, planning, implementing and evaluating creates a sense of ownership in any stakeholder group, and thus enhances the outcomes of activities by sharing a close vision and common or parallel goals. Multiple stakeholders bring multiple viewpoints into the discourse, often resulting in the highly necessary thinking-outside-of-the-box solutions.

*To learn more about identifying your stakeholders*  
**set sail to p. 22 – [Stakeholders](#)**



## OUTSIDE OF THE SCHOOL



An open school can be open in two different ways. Your doors can be open for non-formal and informal providers, but you can also support and recognise learning outside of the school. Sometimes, going out is a practicality: the school doesn't have the means to perform certain activities: your library is not rich enough, you lack a suitable laboratory or an exhibit you want to use cannot be taken from the museum.

Going out of the school can also be a solution to too rigid regulations on timetables, schoolday, who can enter the premises, methodologies used, etc. You can start by offering external activities and making the link to curricular activities as well as grades. For those attending a given STEM lecture at the museum, you offer one good grade that may make their final grade better. It is also a good way to better engage those students who don't feel very comfortable at school.

There are a few important factors to consider:

*Accessibility – to learn more*

**set sail to p. 36** – [Get acquainted with your boundaries](#)

*Environment – to learn more*

**set sail to p. 26** – [Explore the environment](#)

*What the local community offers*

**set sail to p. 43** – [Engaging with local communities](#)



Parents and legal guardians bear the responsibility for educating their children – contrary to popular belief that it is the responsibility of the state – according to the UN Convention on the Rights of the Child, ratified by your country. Thus, when engaging parents, schools actually engage the people they are accountable to. It has been established by decades of research that all parents, regardless of their background, education or status can support their children’s learning. Parents are not only bringing their offsprings to school, but they are policy makers, entrepreneurs, researchers, professionals – many of whom can be your “partners in crime” in day-to-day Open Schooling. Parents can be gatekeepers in two different ways: they can prevent new Open Schooling initiatives by active resistance – an outcome you want to avoid – or they can keep the gate open for new innovative ideas and methods – and this is the ultimate goal of engaging them.

For successful advocacy by engaging parents, a few simple rules are to be implemented. *See the next page.*



# Basic principles of an effective family-school partnership

## CLIMATE



Every aspect of the school climate is open, helpful, and friendly

## COMMUNICATION



Communications with parents (whether about school policies and program or about their own children) are frequent, clear, and two-way

## COLLABORATION

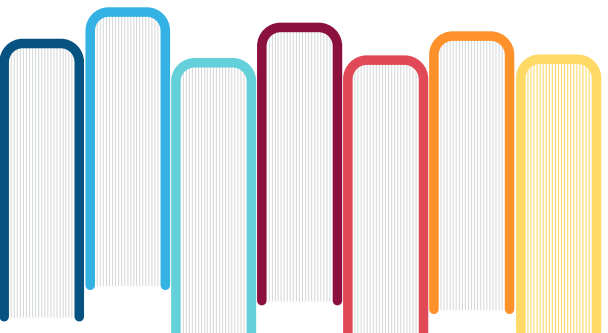


Parents are treated as collaborators in the educational process, with a strong complementary role to play in their children's school learning and behaviour

## COMMENT



Parents are encouraged, both formally and informally, to comment on school policies and (on some issues) to share in



## ALL



The school recognizes its responsibility to forge a partnership with all families in the school, not simply those most easily available. This includes parents who work outside the home, divorced parents without custody, and families of minority race and language

## PHILOSOPHY



The school head and other school administrators actively express and promote the philosophy of partnership with all families

## VOLUNTEER



The school encourages volunteer participation from parents and the community-at-large

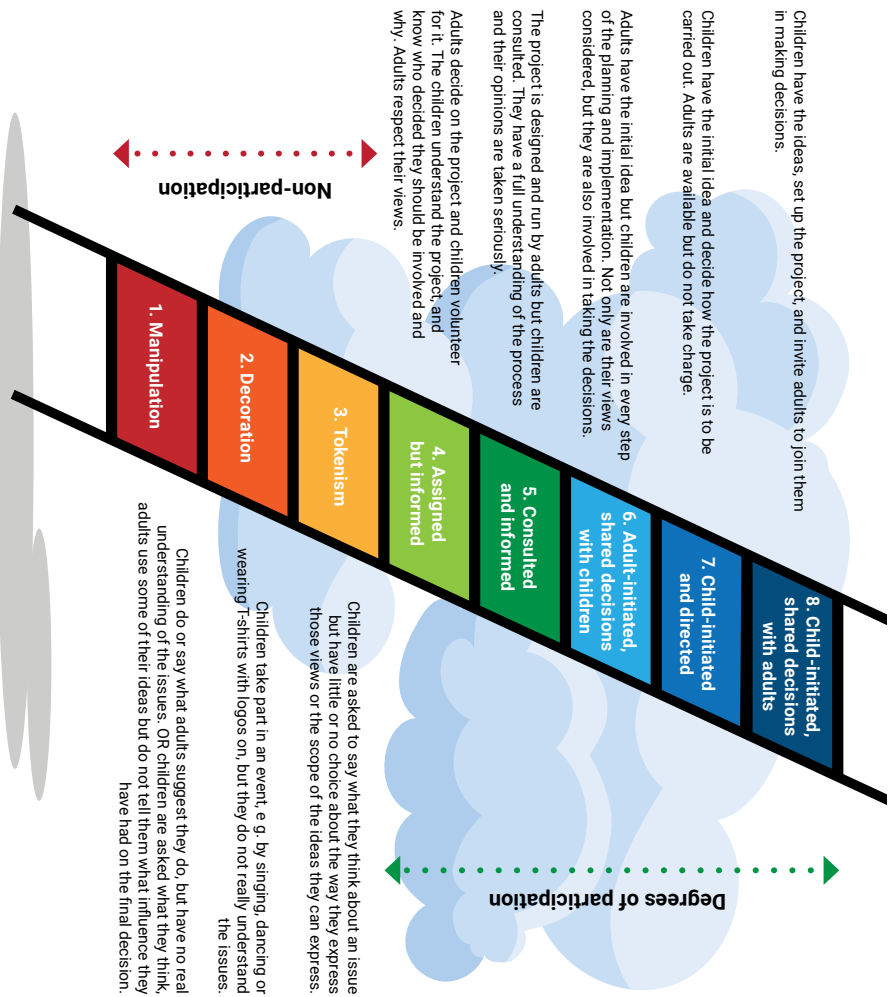


Children as young as 2 years of age can be engaged in designing their education activities. While legislation acknowledges child agency, we tend to forget that children are not only the subjects of teaching, but they are capable of assessing their needs, formulating opinions and deciding what is best for them while being aware of the needs of their peers.

When it comes to adults understanding that children have agency and supporting its development, it is worth having a historic look at how much adults have trusted children that they are capable of doing things. Jesper Juul, the renown and recently deceased family therapist from Denmark raises this issue in his last book, *Leitwölfe Sein* (Be the leader of a pack of wolves) that has not yet been published in English. In the book, he calls parents to behave like the leader of a pack of wolves normally behave: set directions, allow all members to fight for their status, but support the weaker ones. This is an advice professional educators should also hear.

In engaging students, we are using Hart's Ladder of Child Participation (based on Arnstein's model of 1969). For engaged students, Open Schooling advocacy should aim for level 6-7-8. It is especially important that schools should never shy away from implementing student initiatives or supporting its implementation.

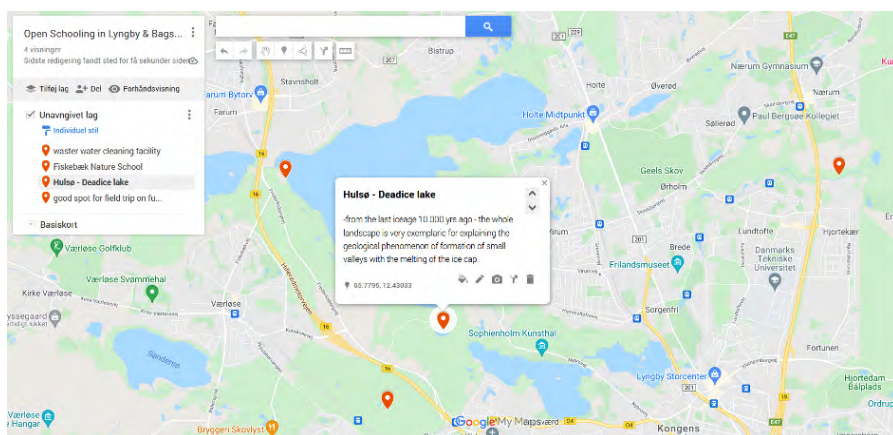
# Hart's (1992) Ladder of Participation



# ENGAGING WITH LOCAL COMMUNITIES



What is the local potential? Who does what for whom and why? Various mapping tools – pen and paper or digital – can be used to create a common understanding of your local possibilities. Don't forget to include potential resources within the school grounds, but the primary aim is to put everything on your map with a potential outside.

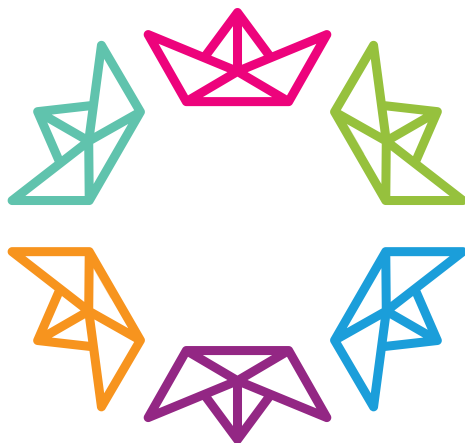


Below is an example of a customised shared local map.

*The My Map feature in Google maps or similar can be very helpful for sharing knowledge of locations and institutions relevant for Open Schooling. In the map above four locations/institutions have been mapped with an red colour marker. Cultural institutions, businesses and companies working with OS, NGOs, community organisations and members, sports and youth organisations could be included. [See the actual map in Google here](#) [4]*

A collective understanding of the possibilities and resources that are within reach of a learning institution is an important element in creating a sustainable integration of Open Schooling in the curriculum. Once you have the map, you can decide how to engage with the various players identified.

You may want to **set sail to page 24** to consult the [Advocacy Planning](#) section.



## TRAINING YOUR TEACHERS



Teacher training is not only a necessity, but also a great advocacy tool. There is nothing more powerful than teachers' own positive experiences with engaging Open Schooling activities.

The PHERECLOS Advocacy Team has developed a Teacher Training Innovation Toolkit on Open Schooling in order to deliver a practice-oriented handbook that can support teacher trainers and institutions that work with teacher training students and in-service teachers in the development of out of school and Open Schooling activities integrated in a school-based context.

The Toolkit, based on the notion of learning-by-doing, offers an approach that makes it possible for practitioners to implement Open Schooling programmes with one of its clear aims being teacher training. The guide will help school leaders and trainers external to the school to consciously use the implementation of Open Schooling as an innovative approach to training. Another innovative element is the co-training of professionals already working at schools and their future colleagues, the pre-service teachers. The Toolkit may also inform the university training of future teachers, offering an innovative approach to compulsory professional practice hours/periods.



The aim of the innovation toolkit is to help schools move beyond a project-based approach towards a sustainable mainstreamed approach to Open Schooling. To that end, relevant training can be offered by the teachers – peer-to-peer, by a non-formal Open Schooling provider, by an external training institution, or even parents or non-teaching school staff with relevant experience.

*Your teachers are engaged by training. How to engage others?*

[Engaging parents](#) – **set sail to p. 39**

[Engaging your students](#) – **set sail to p. 41**

[Engaging local community](#) – **set sail to p. 43**

## FROM PROJECT TO SYSTEMIC IMPLEMENTATION



Financial provisions for education, their amount, allocation and the level of autonomy of schools in the field of budget greatly varies from country to country. In general, school systems have limited financial resources with which to pursue their objectives, thus funding policies and schemes play a key role in ensuring that resources are allocated in a way that ensures necessary changes and development. When implementing innovative programmes, such as Open Schooling in the field of STE(A)M education, there is a need to differentiate between provisions for designing and setting up an innovative partnership and maintaining it. Successful open schooling initiatives are only possible in financing environments that provide funding not only for initial phases of such programmes, but also consider and provide for the costs of sustaining it.

In the reality of schools, different bodies are involved in raising, managing and allocating budgets. A growing number of school systems are characterised by multi-level governance, with a growing set of actors including different policy levels, schools themselves and private providers involved in school funding. The reality of your school environment must be thoroughly explored in this respect for successful advocacy.

There is a need for well-designed funding formulas in distributing funding for current expenditure in a transparent and efficient way – a key for advocacy as these are mostly missing. Providing funding to the school directly or financing the costs of non-formal provisions are equally effective and appropriate as long as it is arranged in a well-planned and reliable way for sustainability.

*Who can you advocate? – to identify your policy advocacy targets*  
**set sail to p. 22 – [Stakeholders](#)**

## PACKAGING YOUR OPEN SCHOOLING PRODUCT WELL



As an Open Schooling activity provider – most probably as a non-formal education provider, but possibly a school offering programmes to other schools – you have to be fully aware of the fact that you are selling a “product” in a “market” that is very conservative – like your grandmother who is difficult to convince about the benefits of using an airfryer instead of frying in oil – and that may not see the benefits of the services you offer while being overwhelmed with administrative tasks, teacher shortages and similar challenges.

Thus, it is important to properly present them your offer by

- clearly identifying needs of their students they cannot cater for;
- clearly linking your programme to curricular expectations;
- clearly defining what investments in time, human resources, finances or other resources are necessary;
- introducing the professional background and experience of your staff;
- being preemptive about their safeguarding concerns.

*To learn more about identifying needs*

**set sail to p. 18** – [Needs analysis](#)

*To understand safeguarding challenges better*

**set sail to p. 27** – [Safeguarding](#)

## FURTHER TOOLS FOR YOUR STEAM AND OPEN SCHOOLING ADVOCACY



PHERECLOS Publications to be [downloaded from the website](#) <sup>[5]</sup>

- Teacher Training Innovation Toolkit
- Policy Briefs
- Policy Recommendations Brief
- White Book

### Other tools

[MultInclude Matrix](#) <sup>[6]</sup>

[The Science Capital Teaching Approach](#) <sup>[7]</sup>

[The Hexagon Tool](#) <sup>[8]</sup>

### Inventory of advocacy tools available

Advocacy tools can take more or less any shape and form, but you need to differentiate between tools used for introducing, starting something new and those used for maintenance, sustaining and improvement. At the same time, there are tools specifically developed for advocacy, and those that have an advocacy potential as a secondary use.

### Develop your own

In the advocacy chapter of the White Book, the PHERECLOS consortium is offering two important tools that you may find useful: evidence-based Policy Briefs and Policy Recommendations. They also show examples of tools that can be developed internally for the different phases. The Policy Briefs were developed in the initial phase of the project and are built on external evidence, independent from, but relevant for our project.

The Policy Recommendations were developed in the final phases and are built on internal experiences during implementation, and thus quote evidence from within the partnership. Similarly, you can develop your own tools, for example you can create an analysis of your national education landscape if it is not included in the PHERECLOS Policy Inventory.

The outcomes of your Open Schooling activities can also be utilised as advocacy tools. The following list is aiming at giving you some ideas and sparking your creativity:

- collect testimonials – see examples in the PHERECLOS LEC reports;
- showcase results – e.g. create a virtual gallery, an exhibition or create a publication of student products;
- use the outcomes of evaluation cycles – including surveys, focus group outcomes, interviews with participants;
- compare results of external measurement – e. g. standardised test result improvement over time during your programme implementation, improved numbers in enrolling in further education, decrease in truancy;
- create visual summaries – for example, in the PHERECLOS Sustained Modelling and Scenario Building Reference Guide as well as in the Advocacy Toolkit Adventure Book you will find several examples;
- use the power of photos – however, the PHERECLOS consortium recommends to only use photos that do not show any participants who can be recognised, and in case you decide otherwise, you must have consent of those in the photos (in case of minors, you need to have consent for each image and each use separately by the minor, and you also need the consent of the parents or guardians);

- invite them to focus groups, workshops, conferences, trainings – personal engagement in the programme creates attachment;
- maintain your presence online and use your constantly updated website and social media handles for advocacy.

### Use tools developed by others

There are several tools that are already available, have been developed by others and are suitable for your own advocacy. All PHERECLOS outcomes mentioned in this chapter are examples of that. However, when using such tools, you always have to tailor them to your own advocacy needs by highlighting, summarising or tweaking them (making sure that proper referencing is also included). Sometimes, you may even turn a tool totally upside down and use it for showing how not to do something.

Some examples of external tools you can use for your advocacy work:

- relevant research evidence – We recommend not to use evidence older than 5 years or at least verifying that there is no major research evidence contradicting the one you are using as the landscape is changing rapidly. Similarly, it is important to understand that most research is biased to a certain extent, but some are more likely to not be objective, thus it is worth checking who paid the researcher;
- policy papers by international or European bodies such as UNESCO, OECD, the European Commission
- labour market outlooks;
- outcomes of relevant projects, for example the ones; financed by the Erasmus+ or Horizon2020 programmes;

- comparing national or local results to European benchmarks in education – however, you need to be careful with their relevance. The early school leaver benchmark of the previous period for example resulted in better results in the number of young people leaving school early, but did not prevent a substantial decrease in the level of basic reading, writing and arithmetic skills;
- popular science publications can be very useful in engaging audiences, especially non-professional ones, including politicians;
- relevant articles in mass media can also be used as an anchor, although with the decline of proper journalism, it might be worth double-checking the article you want to use and verify the contents from another source.





## REFERENCES



**[1]** Young, Eóin and Lisa Quinn (2012) *Making Research Evidence Matter: A Guide to Policy Advocacy in Transition Countries*. [Online Publication – International Centre for Policy Advocacy]. Available from: <https://advocacyguide.icpolicyadvocacy.org>

**[2]** <https://multininclude.eu/activities/impact/>

**[3]** [https://www.phereclos.eu/wp-content/uploads/2020/10/PHERECLOS\\_D2.2\\_Policy-and-school-system-inventory.pdf](https://www.phereclos.eu/wp-content/uploads/2020/10/PHERECLOS_D2.2_Policy-and-school-system-inventory.pdf)

**[4]** Google Map <https://www.google.com/maps/d/u/0/edit?mid=1IRu9iqQkmVW3Dk-hX0iMvOK3vViLFwd0B&ll=55.79586175928566%2C12.445631430212432&z=13>

**[5]** PHERECLOS Publications to be downloaded from the website  
<https://www.phereclos.eu/project-structure/>

**[6]** MultiInclude Matrix  
<https://multininclude.eu/2020/04/18/the-multininclude-inclusion-matrix-files/>

**[7]** *The Science Capital Teaching Approach*  
<https://discovery.ucl.ac.uk/10080166/1/the-science-capital-teaching-approach-pack-for-teachers.pdf>

**[8]** *The Hexagon Tool*  
[https://nirn.fpg.unc.edu/sites/nirn.fpg.unc.edu/files/imce/documents/NIRN%20Hexagon%20Discussion%20Analysis%20Tool\\_September2020\\_1.pdf](https://nirn.fpg.unc.edu/sites/nirn.fpg.unc.edu/files/imce/documents/NIRN%20Hexagon%20Discussion%20Analysis%20Tool_September2020_1.pdf)



# TABLE OF CONTENTS

INTRODUCTION	3
WHO IS THIS TOOLKIT FOR?	4
WHY OPEN SCHOOLING?	5
OUR ANSWER	6
ARE YOU A SCHOOL LEADER?	7
ARE YOU A TEACHER?	8
ARE YOU A PARENT OR PARENT LEADER?	9
ARE YOU A NON-FORMAL EDUCATION PROVIDER?	10
ARE YOU A SCHOOL STUDENT REPRESENTATIVE?	11
NEWCOMER TO OS	13
FOR EXPERIENCED SAILORS	14
IN RIGID SYSTEMS	15
YOUR OPEN SCHOOLING OFFER	16
NEEDS ANALYSIS	18
Multininclude Matrix	19
ASSESS THE HERE AND NOW	
Current network	20
Swot Analysis	21
Stakeholders	22
Stakeholder Map: Who Needs What?	23
Advocacy planning	24

EXPLORE THE ENVIRONMENT	26
SAFEGUARDING AND RIGHTS	27
FINANCIAL PROVISIONS	28
TIME MANAGEMENT	29
ASSESSMENT	30
Types of assessment	31
SCOUTING FOR NEW PARTNERSHIPS	32
ADDING AND SUBTRACTING	33
The Hexagon: An Exploration Tool	34
COACHING OTHER SCHOOLS	35
GET ACQUAINTED WITH YOUR BOUNDARIES	36
ADVOCATE FOR (MORE) SCHOOL AUTONOMY	37
OUTSIDE OF THE SCHOOL	38
ENGAGING PARENTS	39
Basic principles of an effective family-school partnership	40
ENGAGING STUDENTS	41
Hart's (1992) Ladder of Participation	42
ENGAGING WITH LOCAL COMMUNITIES	43
TRAINING YOUR TEACHERS	45
FROM PROJECT TO SYSTEMIC IMPLEMENTATION	47
PACKAGING YOUR OPEN SCHOOLING PRODUCT WELL	49
FURTHER TOOLS FOR YOUR STEAM AND OPEN SCHOOLING ADVOCACY	50
REFERENCES	54