



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

# CHANGE MANAGEMENT TOOLKIT

## Introduction

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# INTRODUCTION

The Change Management Toolkit (CMT) is a collection of tools on how to achieve change in education. The CMT is an output of the STAIRS – „*Stakeholders Together Adapting Ideas to Readjust Local Systems to Promote Inclusive Education*” – an Erasmus+ Key Activity 3 Support for Policy Reforms framework project. The main goal of this project is disseminating and upscaling good practices currently in place in Portugal and Ireland (sharing countries in the project) in the field of social inclusion and the examination of the adaptation process in the learning countries (Croatia, Czech Republic, Hungary, and Slovenia).

One of the essential aims of the STAIRS was to select good practice initiatives that displayed effective multi-agency partnerships to address a particular community or need on promoting inclusion through and in education. For that purpose, a set of activities have been developed, and documents produced, such as ‘*Case Studies of Good Practices*’ by the sharing countries and ‘*Country Reports*’ by the learning partners to identify learning needs to promote inclusion in their contexts. Those documents having been produced, the learning activities taken place, standing out the preparation for the study visits to Ireland and Portugal, as well as their implementation. Then, new knowledge acquired by the national teams of learning partners have been identified, as well as the part of that knowledge that could eventually be adapted to each national context. It was in that phase of the process that ‘*National Adaptation Plans*’ (NAPs) emerged, which should draw up the potential adaptation of policies and practices based on lessons learned to the respective contexts.

The NAPs have been structured into five sections (four individual chapters + Appendix): 1) Summary of the country’s local focus as evident in the Country Report; 2) Summary of study visits; 3) National Adaptation Plan; and 4) National Adaptation Plan as an introduction to developing the European Guidelines. Our focus will be chapter three, which indicates three different steps to present recommendations to foster inclusion: 1) in this point, lessons learned should be reconsidered, focusing on how they relate to the respective national needs identified in the ‘*Country Reports*’; plus, it should be pointed out the main steps to be taken so that they can be adapted to fulfil national needs, and define the desired results to be achieved, the obstacles to be faced and possible solutions to overcome them. At this point, the possible advantage of drawing up an action plan has been acknowledged; 2) in this point, it has become evident that the recommendations should be addressed to the different stakeholders in each national context; 3) in this point, guidance has been provided on how institutions participating in the STAIRS could play a leading role in spreading lessons learned and building on them locally and nationally. To this end, they should identify the objectives, and results to be achieved, as well as indicators of change; the necessary resources and support, namely the main stakeholders; foresee possible obstacles and risks to be faced as well as how to manage them.

In fact, to make change happen is different from planning it, even though planning is the first step to be taken. Change management is often the key component in driving the success of any venture. However, change initiatives are not all equally disruptive. Some will have a greater impact and be more challenging. Others may be barely noticeable. Change can be divided into two main categories: ‘incremental’ and ‘transformational’ (Nauheimer, 2005). *Incremental change* is easier to implement successfully. It is often based on the current state to improve the existing way of doing people’s work. It typically involves fewer changes and affects a small number of people.

The NAP concept paper precisely considers this possibility of change, indicating that the recommendations for adapting policies/best practices should be those that best adapt to the national context, without changes, as they can be adopted directly, or modified to better suit them.

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

Thus, the present CMT will consider the change management recommended generically in the structure of the NAPs, giving special emphasis to the role of people, since the common denominator to achieve success for all change initiatives is *people*.

In fact, *transformational change* is more difficult to implement, typically having only a 30% success rate, according to Nauheimer (2005). Why is that? Things get more challenging when the change is *transformational*, because it involves a fundamentally new way of doing things. This typically involves significant culture change and affects many people. Culture is people’s values, beliefs, assumptions, and unwritten rules. These shape people’s behaviours and mindset as well as their performance, which in any case are at stake in any change in education.

Therefore, the CMT is divided into two parts: a conceptual part, dedicated to the issues of change for the promotion of social inclusion in and through education. And an instrumental one presenting a series of tools that are considered useful to carry out the change foreseen in the NAPs. These tools have been selected considering who the recommendations in the NAPs are addressed to, namely “Government / municipalities (policy level); School leaders / teachers and other practitioners; Educational experts / academics / researchers; Parents; University students (e.g., teachers in training) / student university groups” (the STAIRS’ NAPs concept paper, p. 4) and should put those recommendations into practice. Some of the tools are meant to be used by specific change agents and others are meant to be used by everyone, as shown in the diagram below.

