

# THE SELF-ASSESSMENT GUIDE



**BE+**  
**PROJECT**

# **TABLE OF CONTENTS**

**INTRODUCTION**

**THE BE+ APPROACH**

**STEP 1- THE QUESTIONNAIRE**

**STEP 2 - THE FOCUS GROUP 1**

**STEP 3 - THE FOCUS GROUP 2**

**STEP 4 - TOWARDS AN INTERNATIONAL STRATEGY FOR THE SCHOOLS**

**APPENDIX**



Co-funded by the  
Erasmus+ Programme  
of the European Union

The European Commission's support for the production of this publication does not constitute an endorsement of the contents, which reflect the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.



## INTRODUCTION

Erasmus+ has been recognized as one of the EU's best-known successes! With a budget of €26 billion, the new Erasmus+ programme (2021-2027) offers schools more cooperation and training opportunities than ever before. However, for the programme to reach its full potential, more schools have to build capacity for international projects. The BE+ (Building Capacity for Erasmus+ in schools) project addresses this challenge.

This self-assessment guide is offered to teachers, principals and school staff as a tool to identify and collect the needs of the school to work with internationalization in four simple steps:

**STEP 1** – The self-assessment questionnaire

**STEP 2** – Focus Group 1 - The organisational and strategic levels

**STEP 3** – Focus Group 2 - The operational level

**STEP 4** – Towards an international strategy for the school

All the steps have been designed in close collaboration with schools from Norway, Germany, Italy and Sweden. The guide aims to lower the thresholds for schools to participate in the Erasmus+ programme and can be used by both

newcomers as well as more internationally experienced schools that want to make the most out of their engagements with the Erasmus+ programme 2021-2027.

The term *capacity building in education* is used in to describe a change process internal to schools that aims to increase the individual and collective abilities of professional staff to continuously improve student learning. However, the very notion of capacity building, as well as many tools used to develop and manage EU projects, originated from the field of international development cooperation. Scholars have been researching the topic and the framework used in this guide is based on the research of A Kaplan.<sup>1</sup>

We hope that this guide will help your school to be part of many future European collaborations. For more information about the BE+ project, please check out other materials on our BE+ website: [beplusproject.eu](http://beplusproject.eu).

<sup>1</sup> A. Kaplan, Capacity building: shifting the paradigms of practice, in D. Eade and E. Ligteringen(eds.), Debating Development NGOs and the Future, Oxfam GB, 2001, pp 322-335.



**Step 1 - The Self-Assessment  
Questionnaire**



**Step 2 - 1st Focus Group**



**Step 3 - 2nd Focus Group**

**Step 4- Towards an  
international strategy**





# THE BE+ APPROACH

The BE+ assessment guides build on Kaplan's three-level model 1) the Organizational level (or attitude), 2) the Strategic level and 3) the Operational level.

## CAPACITY BUILDING BASED ON A. KAPLAN (2000)

### Organisational Attitude



Shared vision of the school

Organisational Self-understanding

Positive approach to learning as an organisation

### Strategic Level



Capacity to plan

Capacity to adapt

Capacity to set priorities

### Operational Level



Activities (E+ Projects, Other)

Resources

Roles



A school will have to develop capacity across all these levels to get the most out of their European collaborations.

## ORGANISATIONAL LEVEL

At this level, emphasis is put on a shared vision of the international dimension of the school across the entire staff. This includes having a shared understanding of the school as a learning organization.

This area relates to a school's ability to plan, set priorities and adapt. The strategic level is closely related to the organizational level as a shared vision is a prerequisite to prioritising and planning.

## STRATEGIC LEVEL

## OPERATIONAL LEVEL

This level refers to the activities, resources and roles inside the school. However, many Erasmus+ projects do not necessarily reflect a school's capacity as an organisation.

# STEP 1 THE QUESTIONNAIRE

The questionnaire is aimed to provide some feedback on the school's current capacity in the context of Erasmus+ collaborations. To best reflect the capacity of the school, we recommend schools to distribute the questionnaire broadly among staff and compare the results from all participants during the first focus group (Step 2).

The questionnaire consists of three sections, each standing for one of the previously described capacity building levels.

## Section 1

The first section aims to assess the shared vision and attitudes of the schools and the wider organisation (e.g, the local school authority).

What is the added value for the school when it comes to international activities? \*

- ☐ It is an important tool for quality improvement for both staff and students of the school
- ☐ It is an important tool to gain access to more ideas and working methods
- ☐ It is an important tool to travel and see other places in Europe
- ☐ It is an important tool to meet and learn from colleagues in other countries

*Example of a question of the first section.*

## Section 2

This part tries to pin down what the school has done in the area of international collaboration and how these projects were carried out in terms of decision-making, leadership and strategic planning.

If the school has never been involved in international activities, the questions address the development work carried out by the school.

Our international projects are based on previously identified needs of teachers/students . \*

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5
- ☐ 6
- ☐ 7
- ☐ 8

1=Rarely 5=Always

*Example of a question of the second section.*

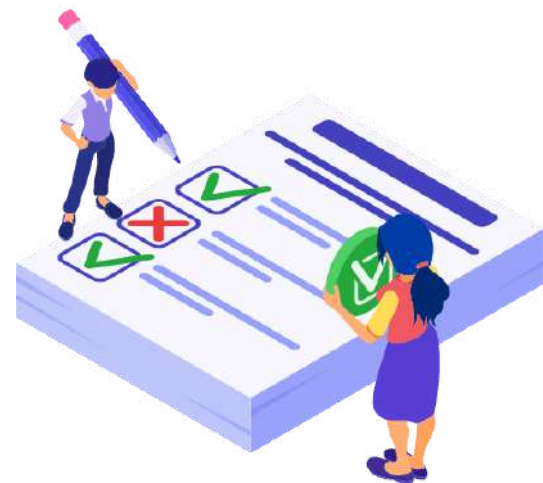
## Section 3

The last section focuses on the operational level of project management. Here questions are posed about how a school's resources (e.g., staff and facilities) and organisation to implement international or national projects.

Have the results of these projects been implemented in the school's ordinary activities? \*

- ☐ Yes
- ☐ No

*Example of a question of the third section.*



## FEEDBACK

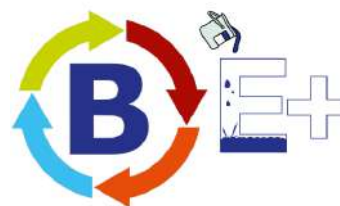
After completing the questionnaire, participants receive automatic and personalised feedback based on the responses.

This feedback is based on the score generated from the totality of all questions. The maximum score is 100. The capacity level has been divided into four levels:

- 1) Low capacity ( 0-42)
- 2) Sufficient capacity (43-60)
- 3) Satisfactory capacity (61-78)
- 4) High capacity (79-100)

Each level takes into account the different aspects of the organisational, strategic and operational level as in the proposed three-level model. A Low Capacity score indicates that there is substantial space for improvement. A result falling under Sufficient and Satisfactory Capacity indicates that there is an adequate or good basis on which a school can build, but that certain areas could be improved. Scores that reach the High Capacity level indicates that the school has a strong capacity for transnational collaboration and needs to focus on sustaining this level.

**LOW CAPACITY**  
of the school to act internationally  
**0-42**



**SUFFICIENT CAPACITY**  
of the school to act internationally  
**43-60**



**SATISFACTORY CAPACITY**  
of the school to act internationally  
**61-78**



**HIGH CAPACITY**  
of the school to act internationally  
**79-100**



The questionnaire is available on the project website ([www.beplusproject.eu](http://www.beplusproject.eu))

An example of feedback returned to one of the BE+ schools:



## BE+ PROJECT

Co-funded by the  
Erasmus+ Programme  
of the European Union



### BE+ Self-Assessment Questionnaire

completed the questionnaire developed by the BE+ project

Below you can find an individualised feedback for which provides indications about the quality of the international work done in your school.  
The TOTAL SCORE for is 84 points out of 100!



High Capacity of the school to act internationally , this means that the school can count already on a strong capacity and only marginal improvement can be applied.

#### ORGANIZATIONAL LEVEL

You scored 29 points out of 35

*This means that the school has a generally very strong awareness of its international work as a key tool for school development.*



International work is carried out on a regularly basis in the school, but it not yet fully recognised as an ordinary activity of the school. The school is fully aligned to the objectives of the local school authority when it comes to international work. The school knows that an international strategy of the municipality exists but is not aware of its details.



### STRATEGIC LEVEL

You scored 33 points out of 35 points

*This means that the school has a very good capacity to plan, evaluate and set the priorities of its international work.*



The school always plans on the basis of the needs of the staff and pupils. The school operates following a plan based on collective needs and does not leave space for spontaneous activities or individual interests.

The processes pertaining new international activities are visible and transparent. The school shares all activities across its main components (teachers/students/parents).

The school has a leadership which is informed about the activities/projects and monitors adequately the processes.

---

### OPERATIONAL LEVEL

You scored 22 points out of 30 points

*This means that overall the school possesses some operational capacity but there is space for improvement on some specific aspects.*



The projects involve an adequate number of school components. The time dedicated by the person/team in charge of international activities is little and/or it made on a voluntary basis.

---

Download

If you need more information about Be+, please contact:

- Katarina Sperling, Municipality of Norrköping, [katarina.sperling@norrkoping.se](mailto:katarina.sperling@norrkoping.se)
- Nicola Catellani, SERN, [nicola.catellani@sern.eu](mailto:nicola.catellani@sern.eu)

[www.bepplusproject.eu](http://www.bepplusproject.eu)



The European Commission's support for the production of this publication does not constitute an endorsement of the contents, which reflect the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.



## STEP 2

### FOCUS GROUP 1

#### ORGANISATIONAL AND STRATEGIC LEVEL



In the second step, the school is asked to deepen their understanding of their school's capacity from an organizational and strategic point of view. The questions in the focus group guide aim to assess whether participants have a shared vision of the school contexts, strengths and weaknesses or not and to make different perspectives in relation to transnational collaboration visible. The questions also aim to identify the needs of the school at both the organizational and staff level. To get the most out of both focus group sessions participants in the focus group should represent different roles in the school e.g. principals, teachers and administrative staff. Striving for diversity when it comes to working experience and how long the persons have worked at the school is recommended. This way a shared result at the school level can be identified and disseminated across many levels within the organization.

Remember to:

- keep a clear focus on the questions in the guide;
- set a well-defined time for the discussion, not more than 1,5 – 2 hours;
- ensure that everybody has the chance to express his or her opinion;
- encourage a diversity of perspectives within the group;
- save 15 minutes of the focus group to summarise the discussion and identify the most relevant topics.

#### PROCEDURE

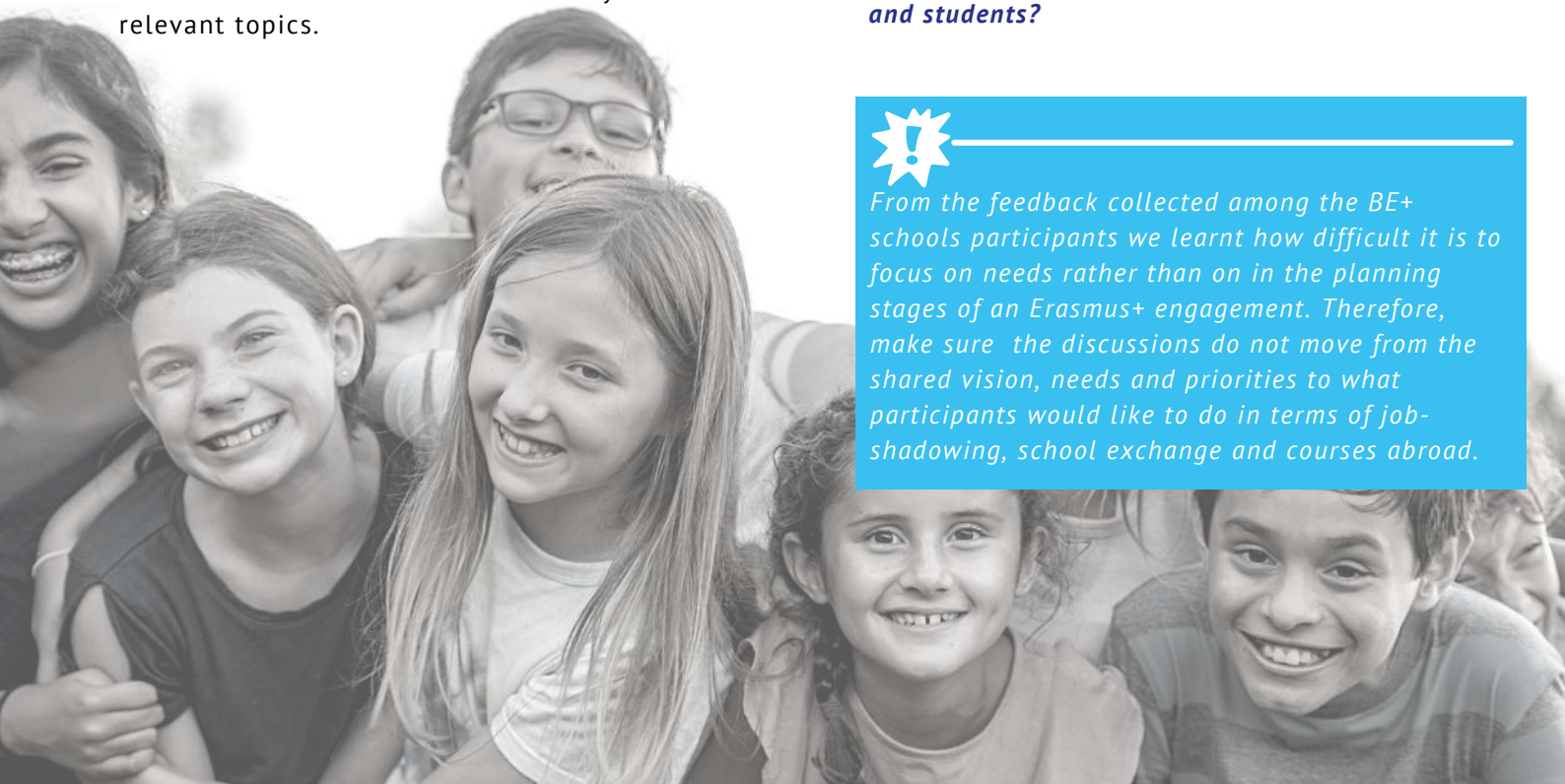
1. Choose one person/moderator to cater for the questionnaire and summarize the results from it to the other participants
2. Allow participants to comment on the results of the questionnaire for 10-15 minutes.
3. Set aside enough time (min 1 hour) to discuss questions 1-5.
4. Decide who shall be the timekeeper in your group.
5. Pick somebody to document the questions. The questionnaire 1 form (page 1) can be used for this purpose
6. Distribute the documentation to all participants after the Focus Group 1

#### QUESTIONS

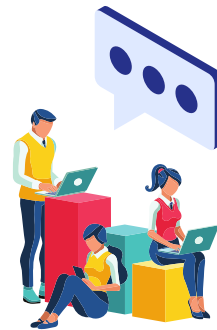
- *What is the context of your school (location, students' profile, resources etc.)?*
- *Which are, in your opinion, the main strengths of your school?*
- *Which are, in your opinion, the main weaknesses of your school?*
- *What are the needs and priorities of your school at the organizational level?*
- *What are the needs and priorities among the staff and students?*



*From the feedback collected among the BE+ schools participants we learnt how difficult it is to focus on needs rather than on in the planning stages of an Erasmus+ engagement. Therefore, make sure the discussions do not move from the shared vision, needs and priorities to what participants would like to do in terms of job-shadowing, school exchange and courses abroad.*



## STEP 3 FOCUS GROUP 2 OPERATIONAL LEVEL



The third step of the self-assessment process is to generate ideas and discussions around the operational level, i.e. on how the school wants to work within the Erasmus+ programme.

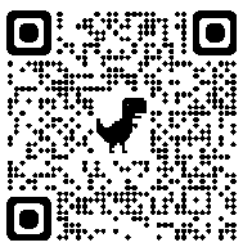
To have a more informed discussion and to define the proper activities that match the needs of the school all participants in the focus group are encouraged to look at the short videos explaining the Erasmus + programme prior to the discussion. These videos also introduce the priorities of the Erasmus+ programme.

### The questions

The discussion in Focus group 2 should be centred around 2 questions:

1. On which activities will the school focus its international work?
2. What should the internal organisation of the school be in international work?

Both questions aim to reflect the current status of the school when it comes to priorities and the organization of activities within the school.



Visit our website ([www.bepplusproject.eu](http://www.bepplusproject.eu)) to watch the short videos about Erasmus+

- Part 1: <https://www.youtube.com/watch?v=j8s337Xc80I>
- Part 2: [https://www.youtube.com/watch?v=IkZ\\_LuZvOuc](https://www.youtube.com/watch?v=IkZ_LuZvOuc)



## STEP 4 TOWARDS AN INTERNATIONAL STRATEGY FOR THE SCHOOL



The previous steps have been important milestones in the development of a self-assessment process in the school. The fourth and final step aims to help the school to develop an international strategy document that reflects the needs and future priorities to address these needs through internationalization.

### **Why does the school need a strategy for its international strategy**

A document that includes the key components of a school's visions and goals of their transnational work is important for several reasons. Firstly, formulating a strategy forces the school to be clear about its priorities, identify roles, and design activities consistent with the objectives on all school levels. The document will also serve as guidance in a medium and long-term perspective to make the right priorities.

There is no one format for what a school's international strategy should look like. In our experience, some recurring elements have been found beneficial to include:

- **General context of the school**
- **Needs**
- **Objectives**
- **Priorities**
- **Activities**
- **Roles and processes**
- **Monitoring and evaluation**

### **The general context of the school**

This section introduces the specifics of the school such as the governance, specific socio-economic context, number of students, teachers, taught subjects, profile etc. It also describes values and visions. Other important elements could be strategic documents produced by the school (in Italy for example the Plan of the educational offer POF), the school authority or other steering documents such as the school curricula or other national initiatives.

### **Needs**

The needs in this strategical document should mirror input collected from the entire school; teaching staff, administrative and management staff, the support staff and the students.

The process initiated by the school through the questionnaire and the focus groups could be mentioned to explain how the needs were identified. The needs identified could also be described by categories that could relate either to a specific group inside the school (for example teachers, students, management staff) or topics of importance (for example teaching-related skills and knowledge, school governance/organisational questions, early school leaving, support to learners etc).

This section should be carefully developed as it lays the foundation for the development of all objectives and planned activities.

### **Example: Need - School absenteeism**

*We experienced a new phenomenon connected to an increasing number of students not attending lessons. We also witness an increase of low achieving students across the entire curriculum. Our school needs more professional development to address these challenges and better support students as well as involve their families.*

### **Objectives of the strategy**

The objectives of the strategy explain what the school would like to achieve through international activities. It is advisable to limit the number of objectives to 2 or 3 and formulate them as concisely and clearly as possible. This will be helpful when engaging with staff, parents, policymakers, and other stakeholders inside and outside of your school. Clear goals also help to better assess if your strategy is successful or not.

### **Priorities**

These should address the identified needs of the school. The priority areas should be clearly explained and could also be related to a specific period. For example, if the strategy covers the time frame 2022-2027 and includes 4 priority areas, Priority areas 1 and 3 could be in focus for the period 2022-25 while priority areas 2 and 4 could be addressed in the period 2025-27. Alternatively, all the priorities could be tackled during the entire duration of the strategy.



### Example: Priority - School absenteeism

*One of the main priorities of the school is to address the problem of students not attending lessons. To tackle this challenge the school needs:*

- Professional training for teachers
- Motivation workshops for pupils
- Special needs resources
- Meetings to facilitate school-family dialogue.

### Activities

This section describes what the school will do in an international context to reach its objectives and priorities. To specify activities, the schools need to have a basic understanding of the opportunities of the Erasmus+ programme and match activities accordingly. For example, if a school wants to improve students' results in mathematics, job shadowing of teachers in other countries or courses could be suitable. Another way to achieve the same or similar results is through cooperation projects with other European schools where all the partner school have the same main focus.

Each activity has different level of complexity which implies different degrees of collective and individual commitment (and work).

The strategy can also indicate how many activities the school intends to carry out. This should be done first when all available resources, for example, in terms of the number of staff willing to actively participate in the activities, have been identified.

### Roles and processes

The strategy should include which key roles will be involved in the international work and their responsibilities. It is advised to define a larger group of people that will be engaged in international activities. Describe how these persons have been selected and how decisions around new projects are taken can be specified as this will enhance the transparency and visibility of your international work. Processes about how projects should be communicated inside and outside the school can also be included in this section.

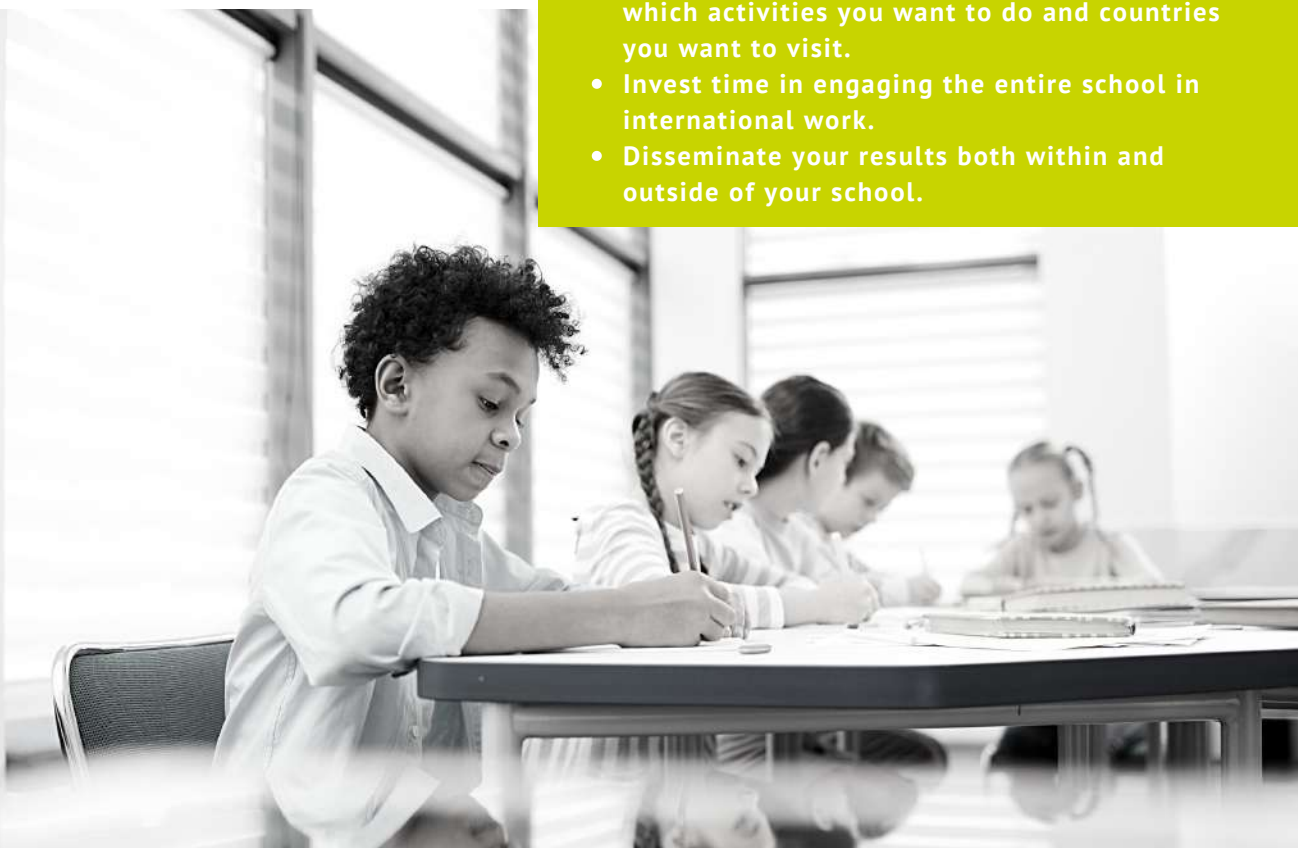
### Monitoring and evaluation

Finally, it is important to set out several identified actions and milestones during which the project can be monitored and evaluated. The identification of one or two indicators connected to each objective can be of help in driving the monitoring process. However, it is important to underline that this process should occur at regular intervals and that a procedure is agreed upon by the school to review and update the strategy.



## FINAL TIPS TO GET STARTED!

- Set up a team that will work on the school's international activities and where the members represent different roles and interests.
- Make sure that the school leader is active in the international work by making them part of this group.
- Focus on the needs of your school and not on which activities you want to do and countries you want to visit.
- Invest time in engaging the entire school in international work.
- Disseminate your results both within and outside of your school.



## **FIRST FOCUS GROUP**

**What is the local context of you school (location, students profile, resources etc.)?**

**What are, in your opinion, the main strengths of your school?**

**What are, in your opinion, the main weakness of your school?**

**What are the needs and priorities of your school on an organisational level?**

**What are the needs and priorities among the staff and students?**

## **SECOND FOCUS GROUP**

Watch the information videos about Erasmus+ at the beginning of the meeting.  
Which activities will the school focus its international work on?

How will the school organise itself internally in order to carry out this work?



## EXAMPLE OF AN INTERNATIONAL STRATEGY

### GENERAL CONTEXT OF THE SCHOOL

#### Description of the school

- Type of school, educational profile
- Number of pupils, number of staff
- Profile of students
- Socio-economical area, location
- Core values and vision

### NEEDS

#### Identified needs for internationalisation

Describe the needs of the school that you want to address with your international work e.g.:

- School achievement in certain areas
- Students well-being
- Attract skilled teachers
- Improved language skills
- Strengthen the international/European dimension of your school

Elaborate a bit on what you already do and what you still need to improve. try to motivate why international collaboration could be one way to address these needs.

#### Previous experience and international dimension

Describe what experience you have of Erasmus+.

### PRIORITIES

In this section you list your priorities at the different levels

#### AT THE SCHOOL/ORGANISATIONAL LEVEL

Priority 1

Priority 2

#### PRIORITIES AMONG SCHOOL STAFF AND STUDENTS

Priority 1

Priority 2

### ACTIVITIES

List the activities that you plan to do and that will help you to achieve your priorities e.g. sending teachers on contact seminars, job-shadowing, participation of staff in course, student exchange etc.

### ROLE AND PROCESSES

Define who will be primarily engaged in this work and how

Describe the different process needed to carry your transnational work

- Describe how you will engage the entire school
- Describe the ways in which you plan to disseminate your international work inside and outside of the school

### MONITORING AND EVALUATION

Describe how will follow up the work and assess whether you are reaching your set goals. Here you can also add how often you will revise your international strategy



# BE+ PROJECT

[www.beplusproject.eu](http://www.beplusproject.eu)  
[www.facebook.com/beplusproject](https://www.facebook.com/beplusproject)



STADT ESSLINGEN  
AM NECKAR



NORRKÖPING



SERN



LULEÅ KOMMUN



ETTORE GUATELLI  
Istituto comprensivo



TRONDHEIM  
KOMMUNE