

RESEARCH REPORT

SOCIOCRACY IN SCHOOLS



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Research coordinator: Martina Paone (QUEST)

Authors : Werner Kratochwil (Soziokratie Zentrum) and Martina Paone (QUEST)

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Abstract: This document is a research report, that summarises the findings of the research activities that the consortium have undertaken in order to systematise, analyse and divulge sociocracy in European schools.



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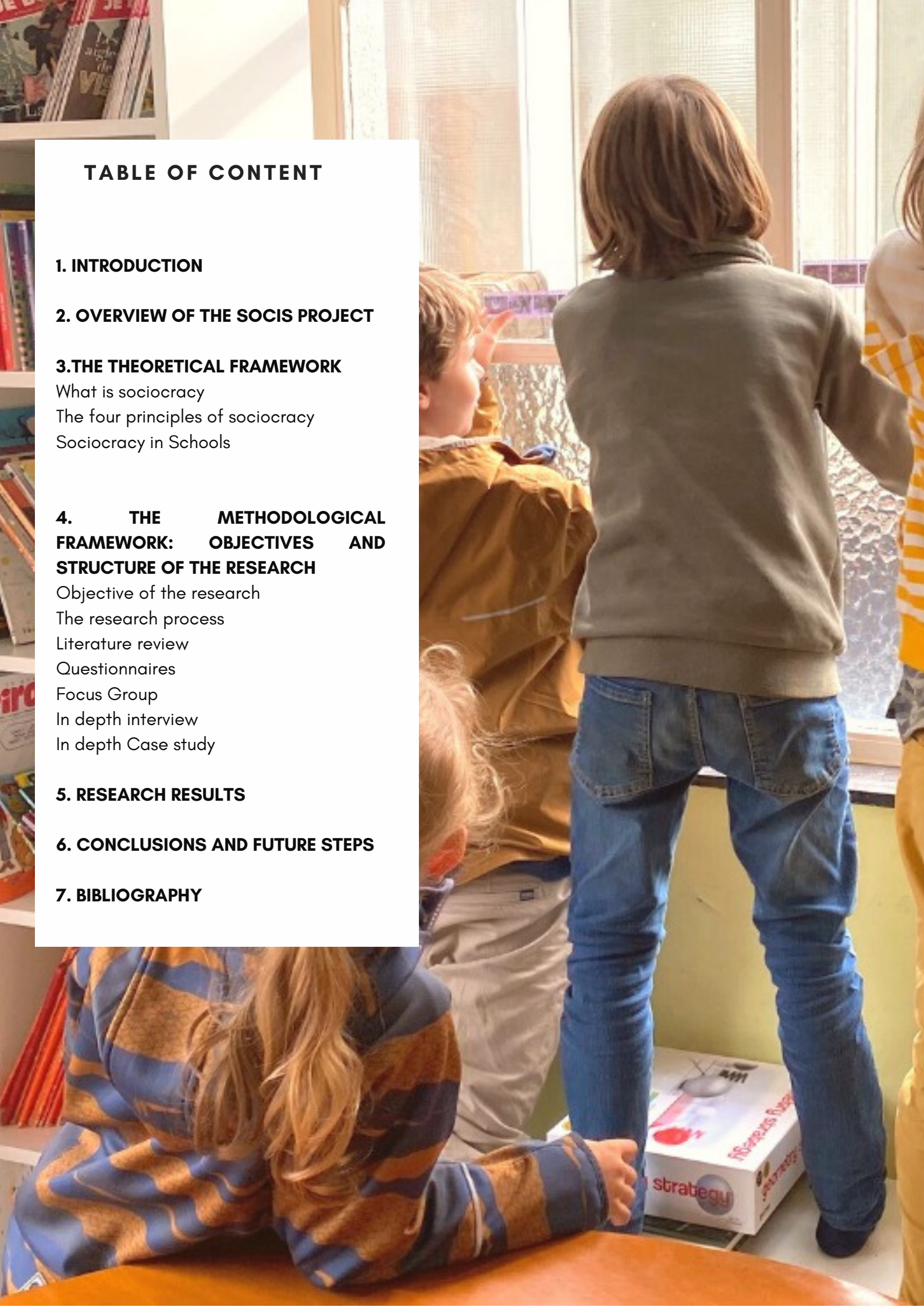
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1. INTRODUCTION

This report outlines the results emerging from a research that took place from April to October 2022.

Before presenting the results, the report introduces what were the aims of the research and what has been the methodology put in place to investigate the state of the art of sociocracy in school in Europe. A literature review will then follow to give an overview of the literature on the subject.

The report then presents the different phases of the research: the questionnaires, the focus groups, the interviews and the case study. The compared analysis of all the different methods is presented. The data obtained are elaborated and assessed to draw conclusions.

The research outcomes constitute the basis for the design of the Workshop.

The purpose of this document is to provide theoretical and methodological guidelines and templates in order to collect data for the first phase of the Activity 1- Research of the Project SOCIS.

The following sections will start with an overview of the SOCIS project, followed by a theatrical and a methodological framework. Subsequently, the document presents the main outcomes of every research method deployed, to arrive at a final joint analysis.

2. OVERVIEW OF THE PROJECT SOCIS

SOCIS is a European project funded by the Erasmus+ Programme (Key Action - 210 - Small scale partnership cooperation for Innovation and Exchange of Good Practices).

The duration of the project is of 16 months, from 01/04/2022 to 31/07/2023

SOCIS is implemented by 2 European Countries (Belgium and Austria). The partnership is made up of one school using Sociocracy (BOS school) and one organisation promoting Sociocracy (Soziokratie Zentrum).

The project has the ambition to support the development of sociocracy in European schools, in order to offer an innovative and democratic setting where every person in the school can have an active participation in decision-making and every voice is heard.

In order to achieve this objective and meet the expected results, the project SOCIS is divided into three main activities:

- A1 Research - A Research providing an overview of Sociocracy in School in Europe
- A2 Workshops - A series of workshops on how to support sociocracy in schools
- A3 Guidelines - Guidelines to scale up the use of sociocracy in schools

This Research is therefore the first fundamental step of the project to analyse the status of affairs in the European Union regarding Sociocracy in Schools.

3. THE THEORETHICAL FRAMEWORK

What is Sociocracy?

Sociocracy is a form of governance that offers effective ways to share power. Using sociocracy, decisions can be more inclusive, egalitarian, and harmonious, therefore better meeting everyone's needs. (Wilder, 2020: 4). The goal of sociocracy is to provide a framework for including all voices in an organisation, so to "respect the equal value of people," (Buck & Villines, 2007 p. 29) and to ensure that "no one is ignored" (Rau & Gonzales, 2018, p. 3)

When we speak of Sociocracy we mean the SCM (Sociocratic Circle-organisation Method), which was invented by Gerard Endenburg in the 1970s for his own company Endenburg Electronics. Since then, it spread out from the Netherlands world-wide.

SCM is properly working in an organisation, when the following four principles are met:

1. Principle: The Consent-principle rule the decision making process

A decision is then made when the present circle members have given their consent to this decision. Consent means: there are no paramount and argued objections to this proposal.

'Consent rules the decision making' means that other methods of decision can still be used if the group previously decided by consent on the use of other methods. (For example, majority voting, or decision by the leader, maybe even by 'subjecting a coin').

In addition to the sociocratic circle meetings other kinds of meetings (eg staff meetings), can take place in which only executional decisions (everyday decisions) are made. In executional meetings decisions are within the framework of the policy-decisions. Executional decisions may be done by other kinds of decision-making as described above.

2. Principle: An organisation is made up of circles

A circle is a semi-autonomous entity that makes its decisions independently, within limits that have been given by a next higher circle with consent. Within these limits, the circle can define his own aim, create and lead the process of how the aim will be achieved and may delegate the execution of tasks to the circle members.

The circle organizes the three elements of (1) leading (planning / deciding), (2) doing (execute, run) and (3) measuring (evaluating / learning). These three elements together form a "circle-process", that is, at each end of a process of lead-do-measure again flows into the pipe what they have learned. The group provides its integral development. This means that the professional, technical education, takes place parallel to the training in the sociocratic decision method.

3. Principle: Two circles are linked together by a double link

At least two people from a circle take part in the decision-making process of the next higher circle: the person in the leadership role and the elected delegate. This brings a two eyes control to the next level and the roles of making sure the circle is functioning and fulfilling requirements from a higher circle is separated.

4. Principle: The distribution of tasks and functions is done by sociocratic "open" elections

The circle elects persons for tasks, functions and/or roles in accordance with the consent-principle after open argumentation. This guarantees that the roles are fulfilled with full support of the circle and in accordance to the criteria, which are consented in the circle as a first step of the election.

What is Sociocracy in School?

For the sake of this research, it is important to remember that sociocracy originated in De Werkplaats Kindergemeenschap, a Quaker-inspired school founded in 1926 by Kees Boeke and Beatrice Cadbury in the Netherlands.

In this first experiment, students were consulted at “talkovers” (Rawson, 1956 as quoted in Wider, 2022) where the students and teachers would discuss issues “on an equal basis” (Plesman, 1961, p. 6). In a school-wide weekly assembly, “decisions were made only when everyone agreed,” a contrast to majority rules vote (Burke & Konings, 2016, p. 726).

Sociocracy was further developed by Gerhard Endenburg, a former student of the school, who systematised the Sociocratic Circle Organisation Method using engineering and cybernetic principles (Endenburg, 1998).

Sociocracy is currently used in dozens of democratic schools worldwide with joint student, teacher, and staff participation in decision-making (Osorio & Shread, 2021), and in other informal education settings. It is also used in children’s parliaments in India with representatives aged 6-18 in thousands of federated groups from neighborhood, city, state, and national levels (John, 2021; Ravi, 2020).

As Osorio and Shread (2021) pointed out, sociocracy as a method of governance can be applied to any type of school, independently of its pedagogy. That means that even a public school - like the Rychenberg school in Winterthur (Switzerland) has already done - can implement a democratic governance and use sociocracy. Pedagogy and Governance are, therefore, two defining pillars of an educational project and one affects the other.

Defining a sociocratic school

In the research processes emerged the need to put forward a definition of what a sociocratic school is. This conceptual definition was required to guide the research but at the same time, we did not want to run the risk of being too strict and therefore not worshipping the efforts of some schools that were in the process of becoming sociocratic.

Two definitions have therefore being proposed in this context.

FIRST DEFINITION:

Sociocratic school: We call a school a sociocratic school, if

- 1) it has completed implementation in at least one of these areas: Organisation, Teachers, Kids, Parents
- 2) has a documented decision in the log of one of its circles that the other fields will follow.
- 3) If the implementation is completed in the organisation area and the school has the possibility to change its constitution on its own, it needs to be a sociocratic constitution (e.g. a public school cannot change its constitution on its own)

SECOND DEFINITION:

School on the way to a sociocratic school:

This is a school that has made trials on one of the areas mentioned above, but does not yet fulfil the criteria of a sociocratic school

4. THE METHODOLOGICAL FRAMEWORK: OBJECTIVE AND METHODS

Objective of the research

The aim of the research is to realise a study on the nowadays presence of sociocracy in schools with the objective of:

- Divulging sociocracy in schools (history, diffusion, state of the art)
- Identifying possible gaps, and needs that will be the basis for the Workshops (A2)

In order to reach a better understanding of the existing education offering that deploys sociocratic tools, we will use four methodologies:

- Literature review
- Questionnaire survey
- Focus group
- In depth case-study

The data gathered by using the four methods will be used to formulate a final Research Report, which will

- Systematising the results of previous activities into a Research Report
- Raise awareness and spread knowledge on the importance of sociocratic education in Europe within and beyond partnership
- Identify needs in terms of competences to be developed during the Workshops (Activity 2)

Three main results are therefore expected:

- > identify and describe, in a comprehensive manner, the presence of sociocratic schools in each country/region, and the methodologies, tools and education material already used to promote such knowledge.
- > identify key competences already acquired among students and staff, and those that needs to be implemented
- > identify ways to promote sociocracy into the relevant education systems.

The research process

The research will be based on qualitative research methods. Qualitative research is the process of collecting, analysing, and interpreting non-numerical data. Qualitative research can be used to understand how an individual subjectively perceives and gives meaning to their social reality.

Qualitative data is therefore non-numerical data, analysed using grounded theory or thematic analysis.

Qualitative research is multimethod in focus, involving an interpretive, naturalistic approach to its subject matter. This means that qualitative researchers study things in their natural settings, attempting to make sense of, or interpret, phenomena in terms of the meanings people bring to them.

The focus is therefore on a descriptive and observational level. (see Denzin and Lincoln, 1994; Aspers and Corte, 2019)

As stated before, the research process will be composed of 4 methods: Literature review, Interviews (in the form of surveys), Focus group, In depth case-study

Literature review

A literature review is a search, an analysis of the state of the art and evaluation of the available literature of the subject of analysis.

A literature review has four main objectives:

- It surveys the literature in the field of study
- It synthesises the information gathered
- It critically analyses the information gathered by identifying gaps in current knowledge; by showing eventual limitations, controversy and by formulating areas for further research

This way, the first step of the research process in the SOCIS project, is to analyse the existing body of knowledge and literature on sociocracy in schools.

Questionnaire

Over the course of the preliminary phases of the research, we realised that the literature review (desk research) was not enough to grasp the complexity of the study of sociocracy in schools. Indeed, the lack of available written resources on this topic, and the novelty of the subject, brought the partnership to decide to include a "questionnaire" to be sent to sociocracy schools, in order to get first-hand information.

A questionnaire was considered appropriate in order to reach a good amount of school in the short period of the research. The questionnaire is also developed in order to reduce the cost of data handling, ensure consistency in the collection and analysis of the data and assuring the comparing exercise feasibility.

The questionnaire is composed of open-ended questions, where respondents provide a response in their own words. We put particular care in ask questions that are clear and specific and that each respondent will be able to answer

Given the small sample of schools applying sociocracy, the questionnaire will be sent to schools applying sociocracy in Europe, therefore not limited to the country of the partners.

The questionnaire assumes a qualitative perspective, it will be however very relevant to consider every country specificity, exploring and mapping exhaustively the entire educational context that is subject of analysis. Indeed, looking at the country specificities will allow us to have a clear comparative reference framework that will be the base for building the Research Report. We aim at collecting answers from 20 schools in Europe.

The template of the questionnaire is included in the Annex I of this document.

Focus Group

Focus groups are used to informally gather information from a small group of individuals who have a common interest in a particular subject - in this case Sociocracy in schools.

During the focus group the moderator conducts a collective interview of participants and creates open lines of communication across individuals. Focus groups rely on the dynamic interaction between participants to yield data that would be impossible to gather via other approaches.

A focus group will be organised in the context of the SOCIS project, in order to discuss with experts to detect potentialities, limits and needs in sociocracy in schools.

Eight European experts in the field of sociocracy will be therefore invited to participate in an online Focus Group of an estimated length of 90 minutes. Participants will be provided with information about SOCIS Project and they will be also receiving an introduction on the project in occasion of the focus groups conducted by project partners acting as facilitators and observers.

The focus group will be fundamental to review the results of the literature review and of the questionnaire. Indeed, given the complementarity of these methods, the focus group will help in gathering a richer understanding of their perspectives of the experts invited.

Partners will report results emerged from the focus groups' in the Research Report.

In depth Interview

After analysing the results of the questionnaire and the focus group, an in-depth interview has been taking place with a sociocracy expert. This interview had the advantage of getting a deeper understanding of some patterns in the research, and clarified some points that the focus group could not, due to the collective format and the limited time allocated.

In depth Case Study

Finally, a case study analysis was done. In depth case-study is a research approach that is used to generate a deep, multi-faceted understanding of a complex issue in its real-life context. We will use a single case approach that can better account for complex interaction effects. In this context the Soziokratie Zentrum will participate for three days in the life of BOS school, observing its staff application of sociocracy.

5. RESEARCH RESULTS

Results from the Questionnaires

Questionnaires with semi-opened questions were sent to 121 schools in Europe.

Two different questionnaires have been created:

- one for schools applying sociocracy
- one for schools not applying sociocracy

We reached mostly the target we wanted for sociocratic schools (19/20), whereas we have been far away from the target for non-sociocratic schools (7/20)

From the given answers, we estimated the responding schools to be in the following phases of sociocracy implementation:

7 schools in phase 1
8 schools in phase 2
6 schools in phase 2-3
4 schools in phase 4
1 schools are unclear
TOTAL OF 26 SCHOOLS

OVERVIEW OF THE RESPONDER SCHOOLS' PROFILES

- 9 out of 19 schools were democratic/self-directed, others Montessori, Waldorf, Agile...
- All schools were private, except only 2 public schools
- different ages (from kindergarten to high school)
- very different number of students (from 15 to 1100)
- one school started 20 years ago, most of the schools started +/- 5 years ago
- 6 schools do not include children yet in the decision making
- 3 schools do not involve parents in the decision-making
- spheres of decision of children (domain) vary extensively

The Focus group

We organized an online focus group gathering 8 experts of sociocracy, on the 3rd of October.

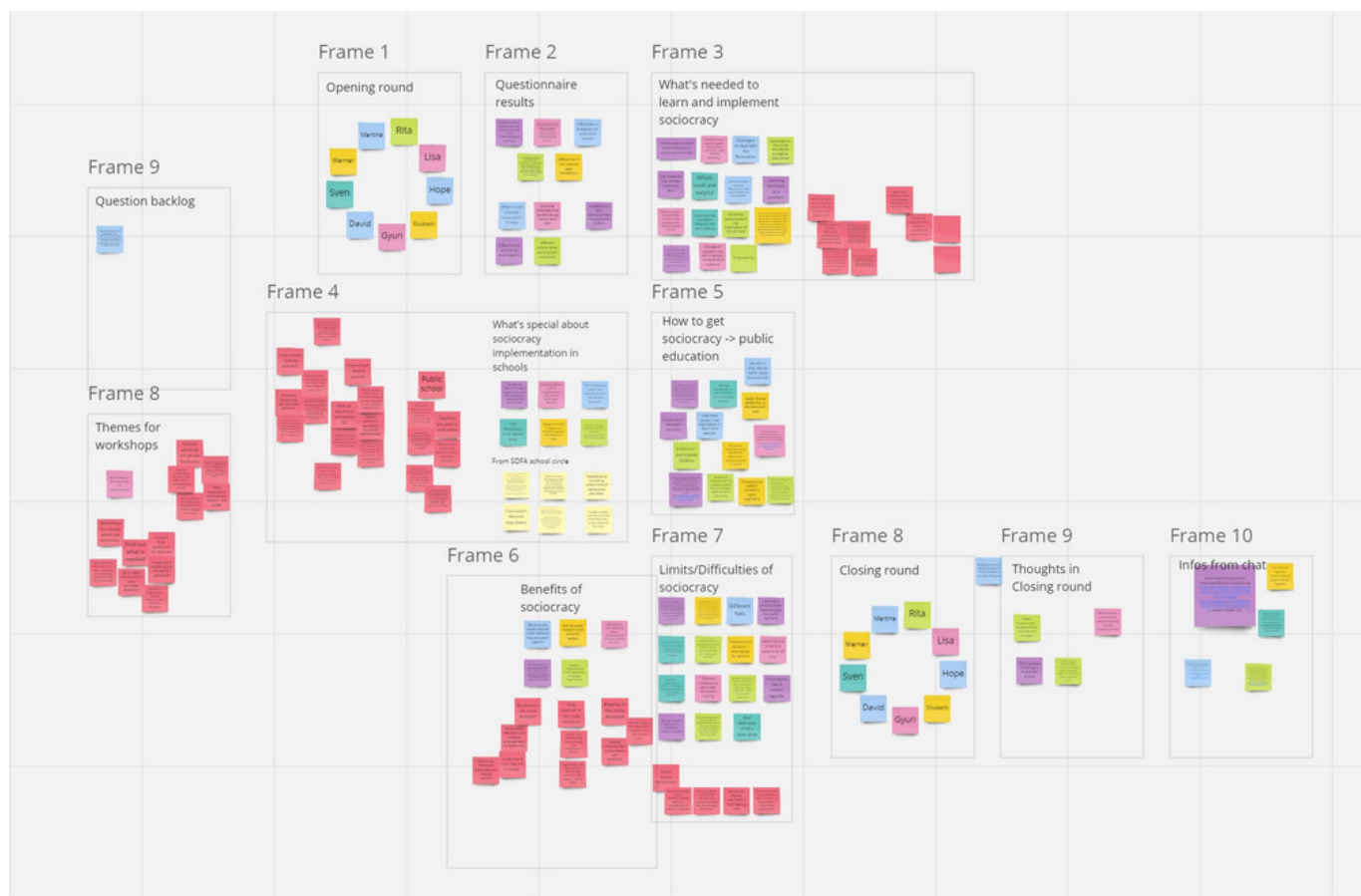
We used this opportunity to debrief about the preliminary results of the questionnaires, and to ask them key questions about the development of sociocracy in schools in Europe.

It was interesting to see in the focus group that the 4 phases of sociocracy implementation were in sync with the phases that school development research describes.

We brought together what's needed to learn and implement sociocracy in schools and how we could reach public schools more easily. So the key moment is to find out what the problem of the school is and suggest in what way sociocracy can help them there. Furthermore you build up trust that the actors in school can decide something and that this actually comes into action.

Make benefits visible and even only pick a certain topic for making sociocracy interesting. Ideas could be: SDGs, Health, political training - giving and getting power and learn how to make good decisions, inclusion, increase participatory, improve relationship and culture, improve life competences, ...

Also it would be a good thing to have all the resources for sociocracy in schools in one place.



The in-depth interview

We could perform an in-depth interview with Barbara Strauch, sociocracy expert and author of books of sociocracy, to exchange about the findings of the literature review and the questionnaires results.

In the in-depth interview we also talked about the subject what's needed to get schools started with sociocracy. The implementation plan of sociocracy could be helpful for democratic schools to setup the governance of the children and get the school running.

When a school implements sociocracy e.g. in a school run by parents, the domains of the different actors have to become clear and it needs time to build up trust. For example, the teachers have to learn to say "No" to parents suggestions and parents have to learn to trust the teachers and focus on supporting the school to run. And also it has to become clear what the domain of the students can be - where they really are allowed to decide on their own.

Also we talked about the benefits of sociocracy in schools, according to the actors.

For the childrens it is noticable that sociocracy in schools has an effect on how children behave at home: they want to decide as home as well.

For the teachers we see that they start collaborating more and more and the efficiency of the organisation is improved.

The parents - like the children- influence their environments with sociocracy and support the educational programs and the operational tasks.

Regarding the limits of sociocracy it became clear that a common meeting time is very hard to find. The school Rychenberg (CH) used the education money to afford the sociocracy experts, which a lot of schools have trouble with.

In both the focus group and the in-depth interview we asked for topics for the workshops, which helped us to create proper topics for the workshops.



The case study

Over the course of the research, we implemented an analysis of a specific case study of the application of sociocracy in one school: BOS Democratic school in Belgium. The following is the analysis of the school and how it applied sociocracy.

The school

BOS has been the first and only democratic school in Brussels. It is based on a democratic philosophy, it is multilingual, inclusive and has a strong focus on outdoors. The school at the time of the case study has 15 students in the age 3 to 12.

The school has been initiated by parents, firstly as a forest kindergarten in 2017, who then become open to children up to 12 years old and incorporated more and more the democratic education philosophy.

The organisation that manages the school (Brussels Outdoor School) runs also several other activities besides the democratic school:

- a research pole in the field of democratic, inclusive and outdoor education in which context runs several Erasmus+ projects with European partners all across Europe.
- summer activities for kids in the school age.
- one day a week forest school activity for children coming from other schools

2. Governance before Sociocracy

Since 2017, BOS school has been constituted as a non-profit organisation called Brussels Outdoor School, and follows this legal structure having a Board of Directors and a General Assembly.

Since the very beginning, the Brussels Outdoor School organisation felt that collaborative governance was the best way to go ahead but also one of the most difficult aspects to put in place.

On the one hand, the organisation always did its best to associate the values to their practice. In line with promoting democratic education - where children and adults are bonded by trust and respect, not by authority and fear - also the adults felt the importance to have the community running the school organised democratically.

Therefore, BOS tried to be a laboratory of collective governance, where children and adults could learn that taking decisions does not imply that someone dominates over others (e.g. by speaking louder or by being longer in an organisation than anybody else).

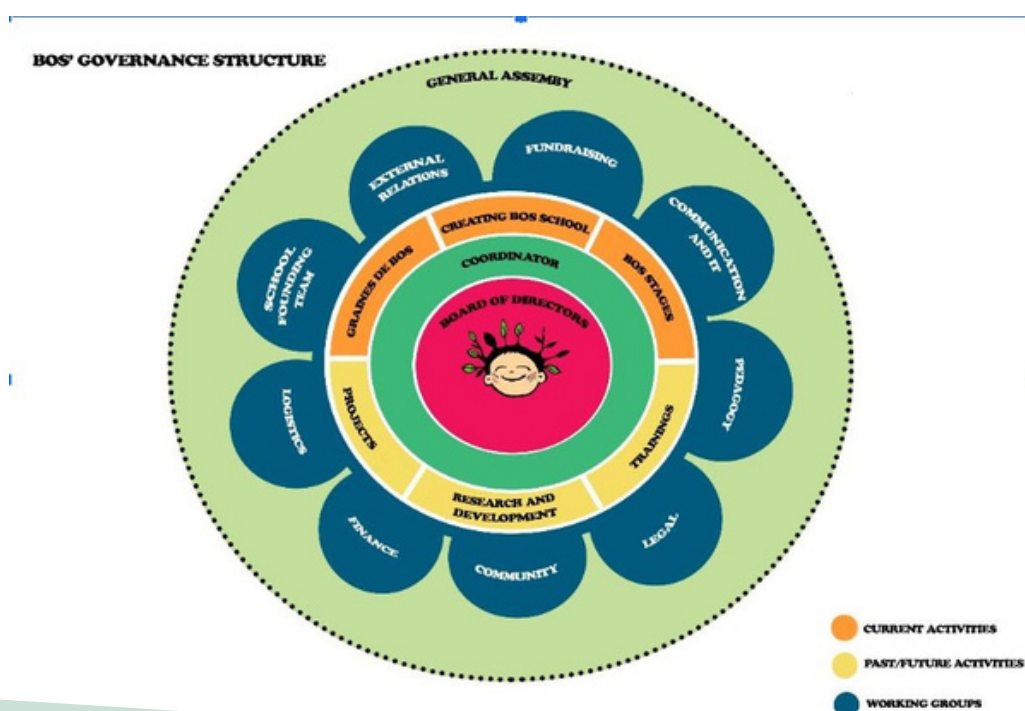
On the other hand, BOS immediately realised that the road to shared governance was also a very difficult one, and not always all members of a group felt secure and heard.

For instance, after one year from the creation of the organisation, one of the founders was not reconfirmed as Board Member due to her style of leadership that was not prone to share power.

At the same time, a quantity of work has been put in place by the coordinator of the project and co-founder Martina Paone, to establish from the beginning a clear and collaborative mechanism of decision making.

Guided by the coordinator, the organisation put in place a continuous reflection towards a collective governance structure, believing in the participation of all our community at an equal level (employees, volunteers, board members, etc..) and in a greater decentralisation of decision-making for a more efficient and healthy organisation.

In 2019, the governance of the organisation was looking this way:

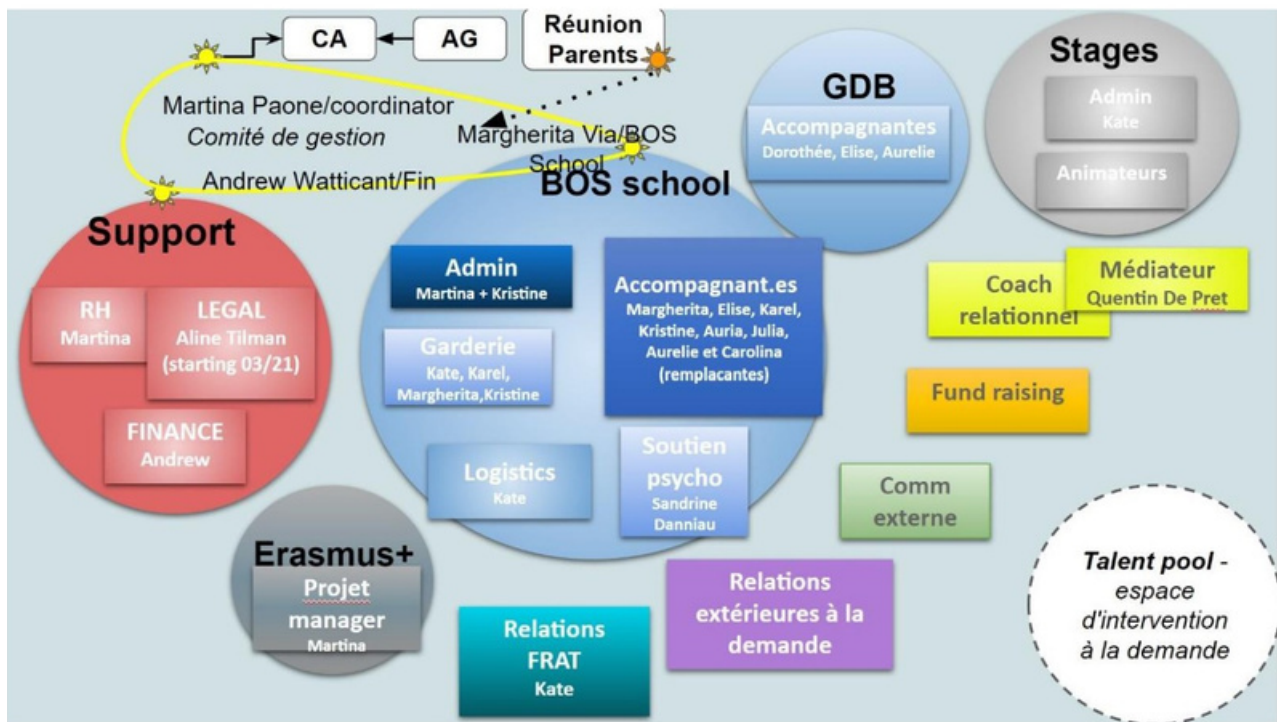


As the image shows, the organisation was formally managed by a Board of Director who was solicited only for urgent matter, whereas the coordinator was bearing almost all the responsibility of the structure, and putting into connection several working groups (in blue) that met to organise the three activities that were launched at the moment: the BOS school, the BOS camps, and the forest school "Graines de BOS".

When the BOS school turned into a democratic school, working five days a week, the limits of this governance setting emerged quite clearly:

- Most of the responsibility was in the hand of the coordinator, who did not have a clear role and therefore was under great stress
- Although there were defined domains for every working group, the coordinator had to support the development of every one of them, and real autonomy was almost never created.
- The Board of Director was not supporting the Coordinator in an established plan of meetings
- Some of the personnel, working in the activities "grains de bos" or "stages" were not part of the working groups and there was still unclear communication among the BOS school and the other activities, besides the role of the coordinator who tried to make up for the missing communication

After a governance crisis, enacted by this and other issues, in December 2020 the team decided to contact Quentin De Pret, professional coach in collective intelligence and organisational restructuring. After the training, the organogram of the organisation was looking this way:



In this structure, we can see several new improvements:

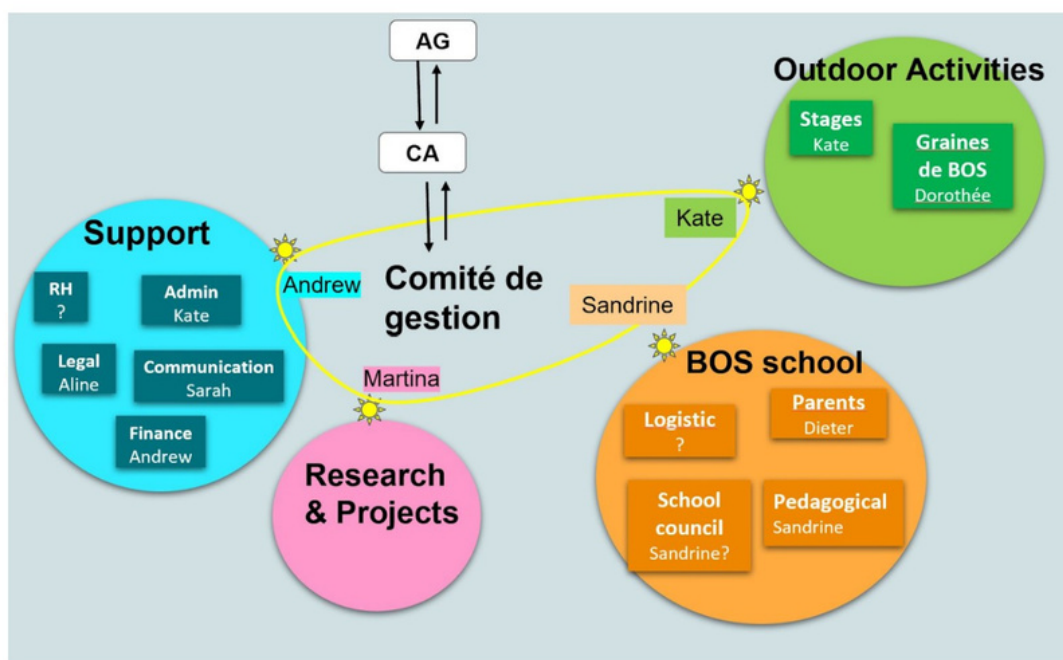
- A Management Committee (Comité de Gestion) is created to alleviate the overcharge of the coordinator. The Comité de Gestion (CDG) is composed of the coordinator and the leaders of the two main circles - the support circle and the Bos school circle. In the CDG is the place where the main decisions that are not on the daily management are to be taken, corresponding therefore to a General Circle in Sociocracy.

- The different working groups have been grouped in two main circles that are connected to the CDG - support and Bos school - whereas other three circles (Erasmus+ projects, activity Graines de BOS and activity Stage) are not connected to the CDG - which creates still a problem in communication flow and decision making.
- The role of a coach and mediator on demand, is included as permanent resource
- All the major roles have been clarified and written
- Parents are not a circle, but an external meeting which can bring proposal to the CDG
- The coordinator remains the person that supervise the daily life of the NGO, and is the point of contact with the Board of Directors.

Despite the new structure providing evident step forwards and improvement, above all for the introduction of the CDG, the simplification of the different working groups in circles, and the identifications of domains and roles, some issues were still present. One in particular was showing the disconnection of the Stage and Graines de BOS activity from the "core" of the organisation, mainly due to the disinterest of the people working in these activities towards the collective management of the organisation.

In order to solve these governance issues that were still creating tensions, the coordinator worked to improve the structure of the organisation and tried to introduce some adjustments together with the other members of the CDG. At the same time, when the coordinator took a parental leave a new internal crisis arose between the newly appointed coordinator and the CDG, and between the CDG and the General Assembly.

On her coming back from the leave, Martina Paone proposed some changes, that have been implemented and designed in the below structure:



This new structure had the following features:

- The role of the coordinator was substituted by the CDG as a collective management organ, formed by the first links of all the operational circles
- Four circles were organised, each one of them sending their leader to the CDG as the general circle
- All activities and roles were included in circles, everyone with clear domains
- The Board of Directors (CA) and General Assembly (AG) were separated from the circle structure.

This structure was still lacking some of the key features of sociocracy (as the double linking, open election, top circle, implementation circle etc..) moreover a culture of feedback was not in place and this was creating problems of communication, bilateral talks and growing tensions.

In November 2021, under the push of Martina Paone, who moved from coordinator to leader of the Research&Projects circle, BOS felt the need to finally getting into the full implementation of Sociocracy, and therefore she contacted the Soziokratie Zentrum to propose them an Erasmus+ project. The project had the twofold objective of improving BOS governance while at the same time promoting sociocracy as an effective system for schools in Europe.

The project was approved, and by the time of the kick-off meeting in Vienna, Martina Paone and Mia Schmallenbach had the chance to start discussing about the organisation structure with Werner Kratochwil, Florian Bauernfeind and Barbara Strauch from Soziokratie Zentrum Austria. Upon the feedback of the consultants it became clear that the Board of Directors needed to be part of the CDG, as there was a structural conflict between the Board of Directors, which legally had the power, but were not part of the circle structure.

3. The Training on Sociocracy in June 2022

In June 2022, Werner Kratochwil came to Belgium as part of the Erasmus+ project SOCIS, to spend three days at BOS Democratic schools, perform participant observation and deliver a training on sociocracy to the team.

At that time, there had been crucial conflicts in the organisation between one member of the organisation - being in the CDG and supported by the General Assembly- and the other active members of the organisation - around 10 people. The conflicts ended up with the affected people leaving the organisation, and with a new election of the Board of Directors, as the totality of the team and the General Assembly supported the remaining CDG and felt quite united in this direction.

During this training, suggestions for the domains and tasks of all circles were made.

The school also received information on the four SCM principles and came to a common understanding of sociocracy. At this point the school decided to introduce delegates and started to elect delegates for all circles as additional members in the CDG.

During the training, the school came up with the idea that the Cafe d'Parent, which includes the parents into the organisation, should not be part of the circle structure. Instead, the parents should choose a messenger, who is responsible for bringing the topics to the pedagogical circle.

It became clear during the training, that the school council, where all pupils make the decisions, should not be part of the circle structure and should decide on activities and clubs, house rules and the budget for decorations and materials for playing and learning.

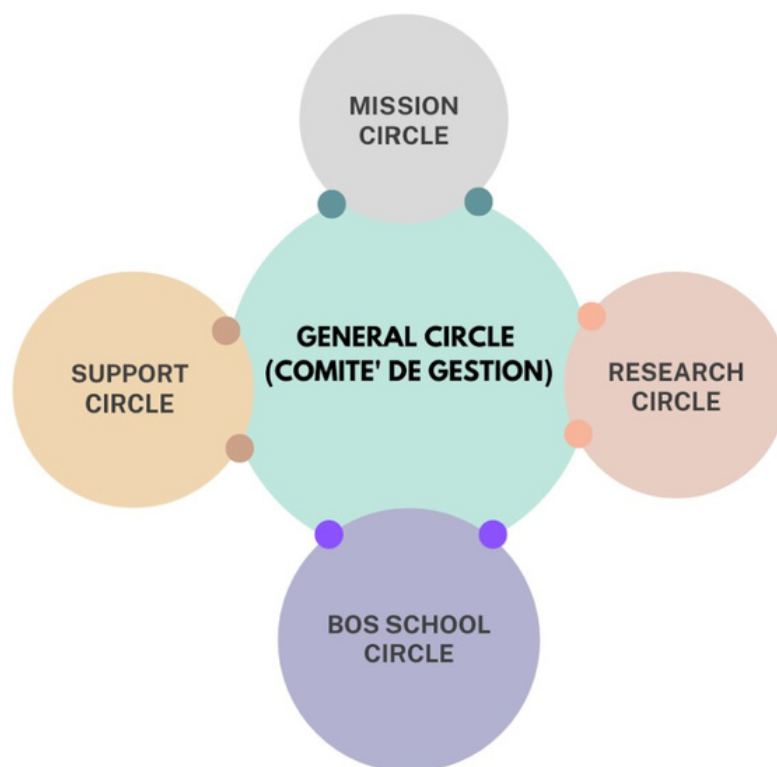
The new clarity made it easier to know which circle is responsible for which task and helped to empower the circles to decide autonomously within their domain. This way, the Comité de Gestion (CDG), which is the general circle in the organisation, decreased its meeting time and frequency and had to validate only the decisions which affect more than one circle, the common values or the long-time visions, such as financial plan, validation of hiring/firing.

During the training the school also got inputs on meeting structure, got demos on how to decide sociocritically and how to do open elections, which helped to become a common understanding of the way of sociocracy.

Additionally, the school got inputs on feedback culture and information about sharing circles, which helped to raise conflicts earlier and have a tool for sharing feelings.

With the help of Werner the school also found a good process how people get in and get out of organisation.

At the end of the training, the new structure of the organisation would look like that:



It can be noticed the following changes:

- The “outdoor activities” circle is not present anymore. Thanks to the work of clarification of aim and domains, and due to the lack of commitment of the persons involved, the organisation decided to discontinue such activities and to focus on the school and the research.
- Double links have been created by open elections, in order to introduce the figure of delegate
- The development circle -that should be in charge of keeping up the sociocratic way in the organisation - was not created but the CDG took over this role.

Immediate results

The training on sociocracy was of immediate importance. The knowledge acquired helped to undertake important steps for the organisation. The following aspects, besides the structural changes, have been fundamental:

- Shared awareness and knowledge of sociocracy. Before that moment indeed, only one person in the organisation had a sound knowledge of sociocracy and tried to implement it and convince others to keep up with this method. But since the training, everyone was committed to keep up with practising sociocracy in the daily life of the organisation
- More transparent communication. Thanks to the introduction of feedback, we managed to start opening up and gathering comments and evaluations much more often, and this gave the possibility to make some problems and tensions emerge in a constructive way.
- Right people in the right roles. The introduction of open elections determined a great change. Thanks to this process, key roles have been put into question, and it has been provided a forum where to openly talk about the most suited persons for some roles. This process also comes with some difficulties. For instance, the team experienced a complicated moment in the decision of the leader of the pedagogical circle, as some persons from the CDG unexpectedly objected to the person that had been covering that role for the previous year, and this determined a tension among these persons, but at the same time it allowed for a problem to emerge and to be named.

4. Results after 6 months - November 2022

As things become clearer and clearer after the training, the question was raised whether the school and the research should stay in one organisation. From June to August the organisation underwent a series of collective reflections to arrive at a model of two organisations which support each other: one Democratic School and one organisation for the research, possibly sharing the same top circle.

At the end of August, the Democratic School received the unexpected news that they could not continue to hold the school in the current building, therefore had to move to another premises. The sudden uncertainty about the new location made several parents decide to register their children in another school. This factor, added to the also precarious contract in the new location found, made the team understand the need to take an annual pause to be able to reorganise the logistics for the school.

At the same time, the research team increased and the research activities have grown more and more. All these aspects led the team of Brussels Outdoor School to decide that the best way ahead would have been to create two organisations, one focused on the research and projects on education, and the other only on the school, remaining the two organisations in mutual support and connected.

In November 2022, the General Assembly agreed to undertake such changes and, to mark this step, renamed the organisation as QUEST (Quality Education in Europe for Sustainable Social Transformation). QUEST became a European Network of educational organisations involved in social and sustainable change, by performing research and projects, and by connecting different organisations around Europe. QUEST has a statutory provision that confirms the application of sociocracy in the organisation as a funding value, and therefore the use of consent decision-making in all cases, except the ones in which the Belgian law does not allow otherwise.

Martina Paone, research manager at QUEST, decided to enroll into the SOFA Academy, an international training program to become a sociocracy expert.

Conclusion

The road to the application of sociocracy for the Brussels Outdoor School has been long and tumultuous. Clearly, the two trainings have marked two crucial moments in the history of the organisation, in which rapid improvements have been made. Sadly, these trainings were not done before the organisation was created, therefore adjustments had to be done while the organisation was active.

Sociocracy helped clarifying more and more the aim of the organisation, and, as over the course of the year this aim became clearer, consequently also many drastic decisions had to be taken. Although these decisions on a first sight had seemed difficult to make (like closing an activity, or dividing the NGO into two) they allowed the organisation to gain in simplicity, efficiency and coherence.

5. JOINT ANALYSIS

Here we provide an overview of the summary of the results obtained by the different methodologies deployed to collect data over the course of the research period.

DIFFICULTY OF GETTING IN TOUCH WITH PUBLIC/STATE SCHOOLS

- despite the number of non-sociocratic schools is definitely larger compared to the number of sociocratic schools we were not able to get a lot of data from non-sociocratic schools.
- Whereas sociocratic schools are enthusiastic to promote this subject, non-sociocratic schools do not know what it means and therefore their level of engagement is close to zero.
- Need to raise awareness about what is sociocracy outside of the circle of people that already practise it

The seven non-sociocratic schools that replied are however schools with a pedagogy that is prone to openness and equality.

They do not apply sociocracy, some do not know what sociocracy is, but they have some instruments to already allow shared governance.

Some of them would like to have more transparency and increase motivation in the school actors through sociocracy.

Some are worried that giving teachers more responsibilities and more decision-making power would overwhelm them, but still curious about how it works in practice.

DIFFERENT SOCIOCRATIC SCHOOLS (different sizes, different pedagogies, different levels of education) **BUT SIMILAR OUTCOMES** in terms of benefits and limits of sociocracy.

DIFFERENT LEVELS OF APPLICATION OF SOCIOCRACY

> sociocracy applied in all circles: major sense of empowerment of children, major influence in the family, though differences between schools where the children domain includes "learning subjects" or not.

> sociocracy only applied in teachers circle: teachers are collaborating and increasing their competences as teachers, the organisation will become more efficient but it requires a lot of effort at the beginning

> Parents in the circle structure: Parents support the educational programs and operational tasks and influence their environments with sociocracy

Great **enthusiasm and positive feedback about the benefits of the application of sociocracy in schools**. No schools regret using this system of governance and they all show that it works and give practical examples.

The benefits are mostly in line with 3 levels (children, teachers, management):

- the management (most effective decisions, more transparent)
- staff motivation increases
- children's sense of belonging, responsibility and citizenship increases

BENEFITS FOR CHILDREN:

- Largely noticed a positive effect on children's sense of belonging, responsibility and citizenship. Pupils are much more motivated and responsible and engaged in making change in the community.
- Student empowerment and engagement creates a feeling of togetherness.
- All schools agree that it is easy and spontaneous to apply sociocracy with children, even though it gets easier to involve them in circles when they are +10.
- Sociocracy comes into the family through the pupils with the culture change of sociocracy
- Large difference between the children domains in different sociocratic schools (in particular between democratic schools and non-democratic schools)
- In schools that students regard as responsive to their expressed critiques, students have better grades and attendance and reduced rates of chronic absenteeism. (Kahne, Bowyer, Marshall, Hodgin, 2022: Abstract)

BENEFITS FOR TEACHERS/SCHOOL STAFF:

- staff motivation
- increased collaboration with other teachers and shared responsibilities
- no problem to find new employees
- clear understanding of roles and competences

BENEFITS FOR MANAGEMENT:

- Decisions are supported and more viable as they are taken together
- Sharing power, makes it more easily for leaders

Effectiveness: clear division of labour, effectiveness in decision making and time management is improved

CHALLENGES: There is also a clear understanding of the challenges, some similar with other organizations, other specifically related to the fact that it is a school.

GENERAL CHALLENGES:

- the human factor (communication, HR decisions in a more horizontal structure, having different roles in the organisation, difficulties to take harsh decisions in a more horizontal structure i.e. kicking out).
- limited time and energy needed to apply sociocracy (need to take some time to learn it, need to rely on free time of people to do many meetings > risk of being overwhelmed, as well as the long time to take decisions in the beginning VS urgencies). adapting the structure takes a lot of time. Teachers can be overwhelmed by the involvement in decisions besides their regular job with kids

CHALLENGES SPECIFIC TO THE SCHOOL SETTING:

parents role: if parents run the school, they can lose their role as a parent, it needs to have special settings to cover this

different hats: learning to think for other fields also (e.g. finance for teachers), Mindset of teachers vs administration, that in the society have been long separated - needs time to bring that together again to decide together.

not a profitable business Financial limitations to get proper sociocratic training

- difficulties of having to respect states rules about education and therefore putting limits to children's decisions). For public schools: difficult to respect rules of government, mostly in consideration of the freedom of children's circle in deciding their curriculum
- large fluctuation of persons: If parents run the school: When pupils are finished with school, many parents also leave the school at the end of school year and the "new parents" are not there yet. It is often hard to keep up the culture and the knowledge within the school.

Regarding the LEGAL FRAMEWORK, half of the countries replied that their government allows schools to deploy sociocracy (Austria, Switzerland, Germany) whereas half says that there are several legal constraints (Belgium, Bulgaria, Spain).

In the former, there are several cases of sociocracy implemented in big public school establishments, whereas in the latter sociocracy is mostly implemented in private schools, and they consider that government limitations are reflected in the freedom of children in particular to have to stick to predefined curricula.

6. CONCLUSIONS AND FUTURE STEPS

The empirical findings showcased in this research provided sufficient information to prove that there are widespread benefits of applying sociocracy in schools.

These benefits are connected with all actors involved in the schools: children, teachers, school managers and parents.

At the same time, the challenges faced in the application of sociocracy in school are still high and concerns mostly with the limited resources (of time, energies and money) that schools can dedicate to the implementation phase of sociocracy.

The study suggests that there are steps to be taken in order to promote sociocracy more in European schools.

Therefore, a roadmap of actions needs to be configured, including:

NEED TO FIND A STRATEGIES TO REACH OUT PUBLIC SCHOOLS

- Grouping the variety of offers about sociocracy in school
- Reach out school directors, or national bodies for school creation/development and show practical examples (case studies)
- Departing from the problems of public education and bringing a solution that sociocracy could offer

NEED TO GET SOCIOCRATIC TRAINING MORE ACCESSIBLE TO

- help schools in learning how to set boundaries, clearer definition of roles, how to manage time and stress, etc ...
- Finding ways to organize (paid) time to learn sociocracy until reaching efficiency
- Strategies to deal with the fluctuation/turnover

NEED TO ORGANIZE THE DIFFERENT SOURCES AND OFFERS ABOUT SOCIOCRACY in a unified space (website or portal) as nowadays the offers are hard to reach, even if they start to be a multiple numbers of offers and all valid.

NEED TO UNDERTAKE MORE EMPIRICAL RESEARCH ON THE BENEFIT OF SOCIOCRACY IN SCHOOLS given the fact that the topic is still unexplored in academia, and given the importance of legitimise these practices via more research and more empirical datas.

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