



# **INCLUSIVE EDUCATION IN ACTION**

## **Project Framework and Rationale**

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**European Agency for Development in Special Needs Education**



Education and Culture DG

**Lifelong Learning Programme**

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## PREAMBLE

The Inclusive Education in Action (IEA) project is based on a unique collaboration between two key international organisations working in the field of inclusive education: the United Nations Educational, Scientific and Cultural Organisation (UNESCO) and the European Agency for Development in Special Needs Education (the Agency). The project draws upon the respective knowledge and expertise from the two organisations and their well-established international networks of policy makers and practitioners.

The implementation of the various activities and development of eventual project outputs depended upon contributions from a number of key actors in the field of inclusive education.

Firstly, the members of the Project Steering Group (PSG) were crucial in all stages of the project. In addition to Agency staff, these members are:

- Kenneth Eklindh, UNESCO, Paris;
- Renato Opertti, UNESCO International Bureau for Education, Geneva;
- Chris Forlin, Institute of Education, Hong Kong;
- Pirjo Koivula, National Board of Education and Agency National Co-ordinator, Finland;
- Theo Mardulier, Ministry of Education and Training and Agency Representative Board member, Belgium (Flemish speaking community);
- Harald Weber, Institut für Technologie und Arbeit (ITA), Germany.

Secondly, professionals working in schools, colleges, higher education institutions, support organisations, local/regional authorities and ministries from across the world submitted the examples of practice presented in the project. Without their contributions, the IEA project would not have been possible.

The contact details of the PSG members as well as contributors of specific examples are available from the IEA website: <http://www.inclusive-education-in-action.org>

The Inclusive Education in Action (IEA) project aims to provide a resource for international and European policy makers working to develop equity and equal opportunities within education systems globally. By means of a user-friendly web site, the IEA project presents examples of policy and practice that illustrate the UNESCO 'Policy Guidelines on Inclusion in Education' in a concrete way. The policy guidelines consider how the 'policy cycle' for inclusive education can be supported by presenting: 13 areas of policy concerns; policy questions; gaps to be resolved and 51 suggested actions. The suggested actions are presented in the Annex (see page 35).

The guidelines follow the principle that inclusive education is understood more broadly as a reform that is concerned with diversity among all learners and is based on a process that involves the transformation of the entire education system. It aims to: '*... assist countries in strengthening the focus on inclusion ... introduce the broadened concept of inclusive education ... and strengthen policy development*' (p. 7).

The ultimate goal of the IEA project is to bridge the 'policy to practice gap' by exemplifying (initially) a selection of the suggested actions. The intention is that the IEA will be a resource for policy makers and will be used as an inspiration to design policy, or to critically examine existing systems for inclusion.



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This report outlines the conceptual framework behind the IEA project and the subsequent methodology and development process undertaken. It aims to:

- Set out the conceptual framework and rationale for the project (section 1);
- Summarise the outcomes of the literature review undertaken to provide background information on the development of a framework to support the selection of examples of inclusive policy and practice (section 2);
- Present the framework of criteria used within the project to select well-documented examples that successfully exemplify the suggested actions in the UNESCO Policy Guidelines (section 3).

The methodology for developing the framework of criteria as well as the framework itself are both presented in this report and aim to describe how the examples presented in the project were selected and also give guidance on the possible analysis and selection of examples in other research settings and situations.



## 1. CONCEPTUAL BASIS FOR THE PROJECT

The aim of this section is to present various research-based perspectives regarding inclusive education that provide the conceptual basis for the IEA project. Crucially, this section presents the stated positions of both UNESCO and the Agency with regard to inclusive education and indicates the common conceptions held by the respective organisations in their work.

### 1.1 Changing conceptions of inclusion in education

Globally as well as in Europe, there is a clear move towards inclusive practice and wide agreement on the key principles first encompassed in the Salamanca Statement (UNESCO 1994). Since that time, these principles have been reinforced by many conventions, declarations and recommendations at European and global levels including the *UN Convention on the Rights of Persons with Disabilities* (2006) which makes explicit reference to the importance of ensuring inclusive systems of education.

It is clear that thinking has moved on beyond the narrow idea of inclusion as a means of understanding and overcoming a deficit and it is now widely accepted that it concerns issues of gender, ethnicity, class, social conditions, health and human rights encompassing universal involvement, access, participation and achievement (Ouane, 2008).

The UNESCO International Conference in Geneva in 2008 raised the importance of inclusion in education as a means of addressing increasing inequality, spatial segmentation and cultural fragmentation. Garcia-Huidobro (2005) points out that equity must be at the centre of general policy decisions and not limited to peripheral policies oriented to correct the effects of general policies that are not in tune with a logic of justice or prevention.

In moving to support education for all and remove barriers to participation and learning for all disadvantaged groups, essential links must be made between the reform of the education system and other policies such as those to alleviate poverty, improve maternal and child health, promote gender equality and ensure environmental sustainability and global partnership.

A Declaration following the Ninth Meeting of the High-Level Group on Education for All (EFA) held in Addis Ababa, Ethiopia in February 2010, confirmed the key role played by education in building equitable and peaceful societies and in sustainable social and economic development. The recommendations of the meeting state that evidence-based, inclusive education policies are indispensable for reaching the marginalised and meeting the educational needs of all children, youth and adults, regardless of age, nationality, race, gender, ethnicity, disability, religion, low social status and other markers of disadvantage. They also highlight the importance of documenting and disseminating best practices in addressing key elements of quality education such as adequately-qualified teachers, appropriate pedagogy, relevant curricula and materials, language of instruction, the promotion of tolerance and peace, and the appropriate use of technologies and open education resources.

This project aims to disseminate examples of inclusive practice from Europe and other regions of the world taking account of the fact that marginalisation in education affects all countries. The UNESCO EFA 2010 Global Monitoring Report 'Reaching the Marginalized' notes that, while absolute average achievement levels are higher in the developed world, in the European Union as a whole, 15% of young people aged 18 to 24 leave school with



only lower secondary school education, a figure that rises to 30% in some European countries.

Rouse (2010) points out that problems with the quality and availability of educational opportunities are not confined to the developing world. Even in 'well-schooled' countries where compulsory education has a long history '*... such concerns may seem irrelevant, but even here, not all children have positive experiences of education, nor do many have much to show for their time in school when they leave*' (p. 48).

Inclusive education can, therefore, be understood as the presence (access to education and school attendance), participation (quality of the learning experience from the students' perspective) and achievement (learning processes and outcomes across the curriculum) of all learners.

This project uses the following definition of inclusion, which is significantly broader than earlier definitions that have often focused on the dilemma between special education and 'integration' into mainstream school. The UNESCO (2008) definition states that inclusive education is: '*an ongoing process aimed at offering quality education for all while respecting diversity and the different needs and abilities, characteristics and learning expectations of the students and communities, eliminating all forms of discrimination*' (p. 3).

Opertti et al. (2009) discuss some of the challenges associated with this broad definition including:

- (a) achieving a balance between universal and targeted social policies, which may positively discriminate towards certain social groups; such targeted policies may be seen as 'second class' or may increase fragmentation and segregation;
- (b) supporting childhood care and education as the foundation for positive outcomes;
- (c) the expansion of basic education to a minimum of nine or ten years, with a smooth transition between primary and lower secondary education;
- (d) promoting a comprehensive and integrated life-long education system (instead of a vertical and static divided system of formal, non-formal and informal education);
- (e) ensuring relevant curricular frameworks and learning tools to meet learners' diverse needs and achieve learning outcomes.

The ideology of inclusive education, as outlined above, is implemented in different ways across different contexts and varies with national policies and priorities which are in turn influenced by a whole range of social, cultural, historical and political issues. Definitions and understandings of what is meant by inclusion and inclusive education vary greatly within countries (D'Alessio, 2007) and there is no agreed interpretation of terms such as handicap, special need or disability. Such differences are linked to administrative, financial and procedural regulations rather than reflecting variations in the incidence and the types of special educational needs in countries (Meijer, 2003).

When considering policy and practice for inclusive education across countries, therefore, it is important to keep in mind that policy makers and practitioners are not always talking about the same thing (Watkins and D'Alessio, 2009). There appears to be a number of reasons for this: firstly, the education systems (policies and practice) in countries have evolved over time, within very specific contexts and are, therefore, highly individual (Meijer, 1999, 2003). Despite this, there are similarities in approaches and aims for inclusive education within all countries, as well as between countries (Ainscow and Booth, 1998).



Secondly, systems for inclusive education are embedded in both the general and special education frameworks of provision that exist in individual countries (Watkins, 2007). There is a need to examine issues impacting upon inclusive education within both general and special education legislation and policy to fully understand teaching and learning in inclusive settings.

Finally, inclusive education in all countries is not a static phenomenon – it has been developing in different ways and continues to develop (Barton and Armstrong, 2007). Conceptions of, policies for and practice in inclusive education is constantly undergoing change and any examination of inclusive education and ‘current’ practice in any country needs to be considered within the context of wider educational reforms occurring in that country.

The UNESCO 2005 EFA monitoring report on quality in education highlights the need to respect ‘indigenous’ views of quality and Mitchell (2005) states: *‘Since there is no one model of inclusive education that suits every country’s circumstances, caution must be exercised in exporting and importing a particular model. While countries can learn from others’ experiences, it is important that they give due consideration to their own social-economic-political-cultural-historical singularities.’* (p. 19)

Despite these varying contexts, fundamental principles can be agreed to overcome barriers which may arise from ‘entrenched professional attitudes, class, sexist or racial prejudice, or from cultural misunderstandings’ (Rambla et al., 2008). Opertti et al. (2009) suggest that Skidmore’s (2004) examples of discourses around *deviance* as compared to *inclusive* education can be helpful in identifying and overcoming barriers to learning. These are summarised below:

	<b>Deviance discourse</b>	<b>Inclusion discourse</b>
<b>Learning capacity</b>	Establishes a hierarchy of cognitive skills to measure the abilities of each student	Highlights the learning potential of each student to be discovered and stimulated
<b>School failure</b>	Learning difficulties are seen as deficiencies in student capabilities	Learning difficulties are seen as a need to reform curriculum and teaching and learning processes
<b>Teacher expertise</b>	Stresses importance of teachers specialised discipline knowledge	Highlights active participation of students in the learning process
<b>Curriculum</b>	Alternative curriculum designed for ‘low achievers’	Common curriculum for all students

## 1.2 Inclusion and the ‘quality’ debate

Inclusive education is increasingly linked with quality education – attending a school or education setting will be of little value if children do not feel welcome and are not able to fully participate in relevant and meaningful experiences. The UNESCO Policy Guidelines recognise two important components of quality – the cognitive development of the learner and the role of education in promoting values and attitudes of responsible citizenship and/or creative and emotional development.

As inclusive education is a policy concern not a ‘discipline’, the expectation in terms of policy examples is not for ‘scientific’ research, but for material that will make the policy



guidelines more concrete and easier to understand. The policy guidelines point out that the concern with quality in education has led to assessments that describe outputs or aspects that are easy to measure (such as literacy and numeracy skills) while ignoring, for example social skills, emotional growth and the societal impact of education.

Alexander (2008) asks: '*... is it right that our attempts to understand and evaluate teaching should be subverted by misapplied scientific zeal and/or an imperfect grasp of language? Or that our account of what matters in the pursuit of educational quality should be so seriously distorted by the application of vocabularies devised for contexts a long way removed from the classroom?*' (p. 37).

It is argued that, for this project, in-depth discussion of scientific paradigms or philosophical assumptions is not necessary and this is supported by Alexander who continues: '*... in EFA, we should be prepared to harness the paradigms and insights of any mode of enquiry which can help us ... In qualitative enquiry "validity" is no less valid for reaching towards authenticity by other than statistical means, and indeed validity in this context is "an incitement to discourse" (Lather, 2001) of just the kind that discussion of pedagogy in the EFA has so sorely lacked*' (pp. 37–38).

While many authors make reference in their work to 'best practices' in inclusive education, very few define 'best practice', or even 'inclusive education' in clear terms. (Roehr Institute, 2004). Cushing et al. (2008) note particular difficulties associated with interpreting the literature and case studies of inclusive policy and practice that often are defined narrowly, inconsistently, or without adequate precision. Therefore, evaluative judgements on the quality of inclusive practice itself will be underpinned by a range of values and theoretical positions, which make any direct comparison of practice across different countries inappropriate.

### **1.3 Inclusive education – a common understanding**

The Inclusive Education in Action project brings together the perspectives of both UNESCO and the Agency, in the broad definition of inclusion outlined above, which has been agreed as the basis for collecting examples of policy and practice. Early Project Steering Group discussions reinforced the importance of both adhering to the broad definition of inclusive education and also ensuring a global, not only a European perspective.

The UNESCO Policy Guidelines state that inclusive education should: '*as an overall principle ... guide all education policies and practices, starting from the fact that education is a basic human right and the foundation for a more just and equal society*'. (p. 8).

The guidelines set out the following justifications for working towards inclusive practices and educating all children together:

*Educational justification.* Inclusive schools have to develop ways of teaching that respond to individual differences and benefit all children.

*Social justification.* Inclusive schools are able to change attitudes towards diversity and form the basis for a just, non-discriminatory society.

*Economic justification.* It costs less to establish and maintain schools that educate all children together than to set up a complex system of different schools 'specialising' in different groups of children.

The Council of Europe (2009) notes that equity and social justice '*imply activities to the benefit of all, targeting each individual*' (p. 46) and states that by using the term equity, '*inclusion may be understood not just as adding on to existing structures, but as a process*



of transforming societies, communities and institutions such as schools to become diversity-sensitive.’ (op. cit.).

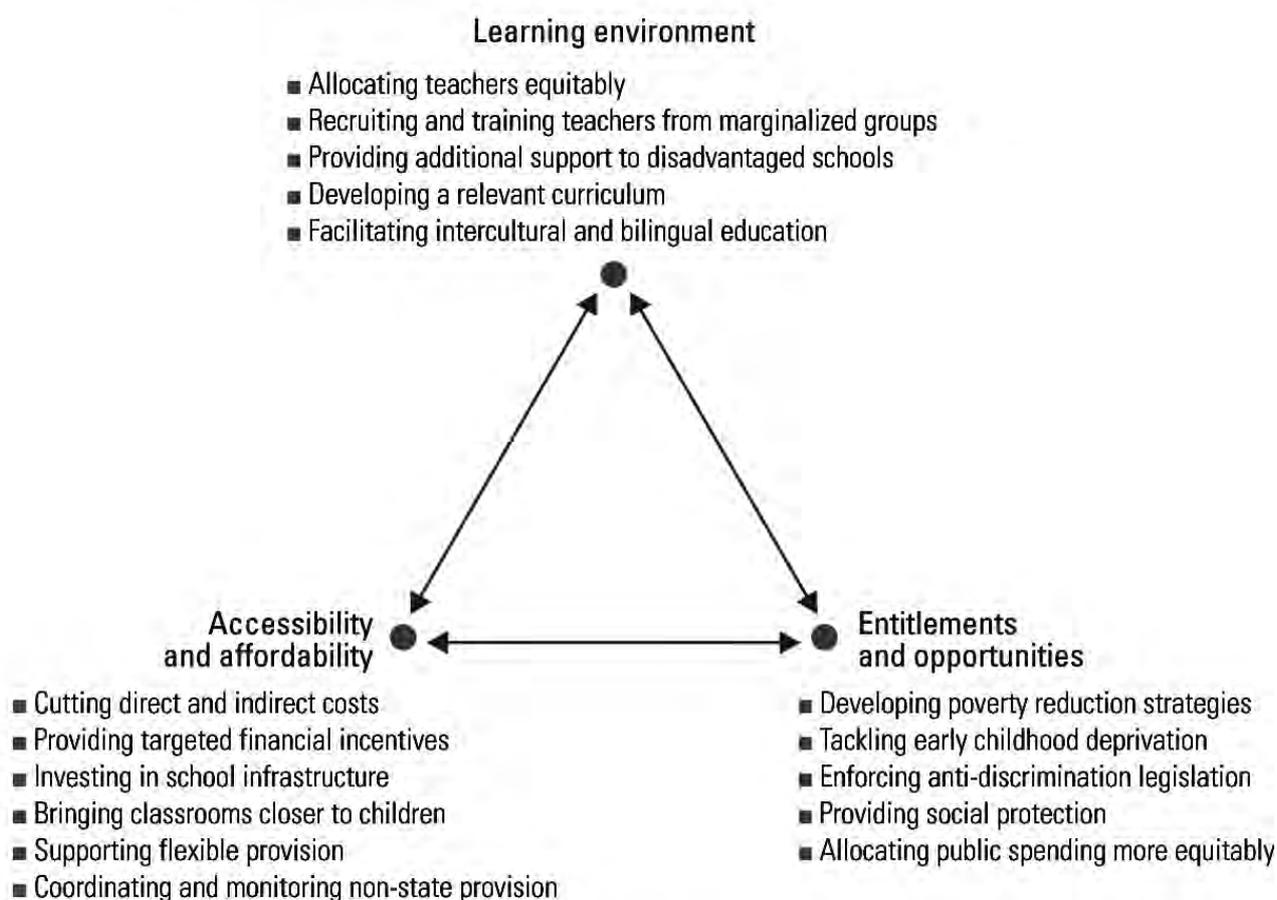
Although the Council of Europe project focused on socio-cultural diversity, the authors make the point that the international commitment to human rights has led to a changing view and a reduced emphasis on an individual’s ‘disability’ that has, in turn, led to its classification as ‘socio-cultural’. This view is consistent with the disability studies perspective which recognises disability as ‘another interesting way to be alive’ (Smith et al. 2009) and views individual support as the norm for all learners.

The OECD (2010) make an interesting distinction between ‘diversity’ and ‘disparity’ where ‘diversity’ is a neutral concept and an ‘inevitable reflection of the richness of human experience’ and ‘disparity’ where diverse characteristics are associated with different outcomes or differential treatment.

In moving towards greater equity, the UNESCO EFA Monitoring Report 2010 identifies three broad sets of policies to help combat marginalisation. These policies can be thought of as the three points of an inclusive education triangle: access and affordability, the learning environment and entitlements and opportunities. This highlights the need, in striving for greater equity, to take account of what happens to children beyond the school.

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### The inclusive education triangle



Source: See Figure 3.29 in the *EFA Global Monitoring Report 2010*.

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However, it is well established that educational reform is particularly difficult where there is a lack of common understanding amongst stakeholders. This highlights the need to take account of different country contexts and shared experiences from which a consensus and a common language around the meaning of inclusion develops.

Despite differences in national contexts, it has been possible to highlight the key principles of inclusive policies agreed upon by Agency member countries. The report *Key Principles for Promoting Quality in Inclusive Education* (2009) aims to encourage debate among mainstream policy makers across different sectors and phases of education about the necessary systemic changes in policy and provision to further develop inclusive mainstream provision. These key principles acknowledge that inclusive education is concerned with a far wider range of learners vulnerable to exclusion than those identified as having special educational needs.

The inter-related and mutually supporting key principles, which summarise the Agency perspective, are as follows:

- Widening participation to increase educational opportunity for all learners;
- Education and training in inclusive education for all teachers;
- Organisational culture and ethos that promotes inclusion;
- Support structures organised so as to promote inclusion;
- Flexible resourcing systems that promote inclusion;
- Policies that promote inclusion;
- Legislation that promotes inclusion.

The Agency similarly believes that inclusive education – or as described in the *Charter of Luxembourg* (1996) a School for All – provides an important foundation for ensuring equality of opportunity for ALL learners in every aspect of their lives, including education, vocational training, employment and social life. This principle was stressed by the Agency Director, Cor Meijer (2010) when he argued that inclusive education is ‘... *in principle of a normative nature and not necessarily subject to scientific proof ... For me, the discussion about the relevance and necessity of social cohesion as well as inclusive education and the influence of inclusive education on social cohesion are purely normative issues. And we should keep them there!*’ (p. 8).

The concepts and ideas described in this section have been used as the conceptual basis for all work undertaken within the IEA project, the main tasks of which are described in the following sections.



## 2. RATIONALE FOR A FRAMEWORK OF CRITERIA

From the outset of the project work, it was agreed by all participants that it was necessary for the IEA project:

- To be explicit about the perspectives and values used to guide the work (as outlined in section 1);
- Have procedures in place to ensure high quality outputs in terms of the examples selected.

In order to develop the resource base of materials to exemplify the UNESCO Policy Guidelines suggested actions, a 'framework of criteria' was drawn up to support the selection of relevant examples. The writing of this framework formed the first stage of the IEA project. In this section, the process for developing the framework is described and the key literature used in developing the framework presented. The eventual framework of criteria adopted for the IEA project is outlined in full in section 3 of this report.

The framework for analysis of examples was developed using three complementary strategies:

- i – Desktop literature research to identify theoretical arguments, issues and evidenced based approaches and data, as well as frameworks for the analysis of educational policy and practice;
- ii – Consideration of the outcomes of the Agency Indicators for Inclusive Education project (<http://www.european-agency.org/agency-projects/indicators-for-inclusive-education>);
- iii – Identification of additional factors regarding the application of examples to the suggested policy actions.

In this section the findings from the desktop literature review only are presented.

An extensive desktop literature review was undertaken to identify underpinning ideas and key issues in developing criteria for analysing examples of inclusive education. The following questions provided the focus for this review:

1. What theoretical background can be used to guide the development of a 'framework of criteria'?
2. Why are criteria needed? What are the main considerations in their identification?
3. What does the literature say about the use of examples (or case studies) in (inclusive/special) education? How does this impact on the development and application of criteria?
4. What similar criteria have been developed and used in (inclusive) education? How successful were they?

The descriptors or keywords used for the literature review followed on from the questions listed above. Key terms included:

- Frameworks for analysis/evaluation of education policy/inclusion/case studies;
- Frameworks for quality in education;
- Considerations in the development of frameworks for education policy;
- Indicators of best practice in inclusion/inclusive education;
- Criteria for selecting/evaluating case studies;



- Case studies/examples in education;
- Evaluating inclusion/inclusive practice/educational inclusion;
- Qualitative research/evaluation;
- Quality indicators for (inclusive) education.

Initial searches were made of Internet resources and databases including ERIC, British Library Direct, Questia and High Beam and journal sources such as Emerald, Sage, ScienceDirect, Intute and OpenDOAR. General search engines (Google, etc.) were used to find 'grey' materials. Where appropriate, general searches were followed up with more specific citation searches.

In the sections below, the main findings from the review relating to each of these key questions are presented.

## **2.1 What theoretical background has guided the development of the framework of criteria?**

While it should be made clear at the outset that the intention and goal of the IEA project has not been to conduct what can be termed 'educational research' it is fair to say that the basic methodology employed for the project could be termed 'qualitative' in approach. Spencer et al. (2003) suggest that qualitative approaches are: '*... largely concerned with exploring phenomena from the perspective of those being studied; with the use of unstructured methods which are sensitive to the social context of the study; the capture of data which are detailed, rich and complex; a mainly inductive rather than deductive analytic process ...*' (p. 3).

Even if we consider the IEA methodology to be termed 'qualitative', according to the definition provided by Spencer et al. (2003), such debates may not add significantly to understanding the theoretical background for the framework of criteria to be used within the IEA project. What may be more useful is a consideration of the purpose of the framework and the IEA project overall.

The British Educational Research Association (2000) suggests that there are two main directions for educational research and explorations:

1. To inform understanding of educational issues, drawing on and developing educational theory and in some cases theory from related disciplines (for example sociology, psychology, philosophy, etc.);
2. To improve educational policy and practice, by informing pedagogic, curricular and other educational decision-making.

The development of the framework of criteria can be clearly seen as a tool to be employed within a project, which has the aim of improving educational policy and practice, by informing educational decision-making.

## **2.2 Why are criteria needed? What are the main considerations in their development?**

The development of the framework of criteria while being located in the qualitative approach arena, can be seen as essentially utilitarian in nature. For the purpose of this project, a framework of criteria was required:

- To guide the project staff team in the selection of examples that would effectively exemplify the suggested actions from the UNESCO Policy Guidelines document;
- To provide guidance to any professionals submitting examples for consideration.



The desktop review set out to explore a range of criteria and justify their selection. Within the literature review process, the use of different terms for 'criteria' in educational research work was considered. This included reference to material debating the use of indicators within educational work.

The outcomes of the Agency Indicators for Inclusive Education project (Kyriazopolou and Weber, 2009) were used as a starting point for the review of literature. This report notes that '*currently there are very few qualitative or quantitative indicators available in the area of SNE and inclusive education at the European level*' (p. 9).

The report reviews some indicative examples of indicators that were considered to have some relevance to the IEA work e.g. *Index for Inclusion* (Booth and Ainscow, 2002), *Quality Indicators in SNE* (Hollenweger and Haskell, 2002), *Disability Rights in Education Model* (Peters, Johnstone and Ferguson, 2005).

Other national level examples of using indicators include: How Good is our School (HMIE Scotland, 2004) Minnesota's Together we're better (Thurlow et al., 1999) and California's LRE Initiative (California Department of Education, 2000) reviewed by Davies et al. (2005) while developing an inclusive practice self-assessment tool to improve school capability.

However, as experts in the Agency Indicators project concluded, none of the existing sets of indicators are likely to be suited to transfer and use in other national educational contexts or at the European level.

Gersten et al. (2005) highlighted the need for quality indicators, due to the increasing demand for more rigorous research in education. The National Research Council in the USA (NRC, 2002) noted in a report on scientific research in education, that they saw no reason why education could not be subject to the same scientific methods as other disciplines.

Breiting et al. (2005) state that quality criteria cannot be considered as a tool for 'quality control', but as an opportunity for 'quality enhancement', open to on going debate in a participatory way. With this view, quality criteria should give orientation and inspiration but should not be confused with 'performance indicators'. He says: '*A set of criteria may be considered as a 'translation' of a set of shared values formulated in terms that are more explicit and closer to the practice but not as prescriptive and limited as performance indicators.*' (p. 9)

Lewis (2008) points out that positions regarding the application of quality criteria vary from rejection of any formal system, through the need for guiding principles, to alternative/modified criteria and use of traditional criteria for more 'scientific' research. An example of this can be seen in the work of Lincoln and Guba (1985) who translated the terms usually associated with quantitative research for use with qualitative studies, under the heading 'trustworthiness'.

Aspect	Qualitative Term	Quantitative Term
Truth value	Credibility	Internal validity
Applicability	Transferability	External validity or generalisability
Consistency	Dependability	Reliability
Neutrality	Confirmability	Objectivity



Morgensen and Mayer (2005) make the following points about the use of indicators used for evaluating environmental education programmes:

1. Indicators mean accepting that an educational process – be it a large scale project or a process involving just one teacher in only one class – is too complex a process to be ‘measured’ only by short-term outcomes.
2. Indicators do not necessarily propose the ‘measurement’ of a result or the adoption of a linear input-output model. They do not need to resort to numbers or statistics.
3. Indicators should not be used alone but should be correlated within a system (Nuttall, 1992) in which the relationship between the components is an element of the evaluation. The indicator approach to evaluation is systemic and the information provided by the whole system is greater than that provided by the sum of its parts.
4. An indicator system must have its own logic and ethic, should be based on a model and on values that must be explicit, and in which the importance of the various indicators is stressed (Oakes, 1989). The values and models will differ according to the cultural context and to the project elements to be evaluated. Differences and similarities between models – and thus between indicators – will also provide an element of comparison and evaluation.
5. Indicators do not constitute a static system, but a continuously developing dynamic one and so require continuous updating.

The Education Data and Policy Center (2009) suggests any indicator framework must be kept simple but flexible so as to be relevant to different regions, populations, districts, communities, etc. They state that having a standard framework of indicators is important and suggest that reviewing best practices as well as global frameworks of educational quality could help develop indicator frameworks which recognise the need to focus on meaning at every level.

The literature review, therefore, highlighted a lack of consensus around the use of quality criteria and indicators and some researchers have noted in particular that a number of the current standards for assessing quality are not well suited for research in the field of disability (NCDDR, 2003; Spooner and Browder, 2003).

Hammersley (2008) states that quality is always a matter of judgement and no set of general rules can replace this aspect or make the process transparent. Dixon-Woods (2004) puts forward the view that critical appraisal of qualitative research may stifle creativity.

Morgensen and Mayer (2005) state: *‘A culture of complexity requires an evaluation that ... gives up the illusion of scientism ... that goes beyond the idea of evaluation as assessment and keeps instead to a meaning of evaluation as “assigning value” and of “bringing out” the strengths of a project.’* (p. 28)

Given the complexity of qualitative research and also the complexity of inclusive education, it is inevitable that the process of making judgements about quality will not be straightforward. Pawson and Tilley (1997) highlight the importance of taking into account the different perspectives of various stakeholders, who may see programmes or interventions differently. They also recognise that understanding actions, such as those in the examples, will require an understanding of the social mechanisms at work within each context.

While acknowledging the range of views, the task for the IEA project remained – to develop a framework of criteria to ensure that examples are fit for their intended purpose of disseminating and exemplifying the Policy Guidelines on Inclusion in Education. The



literature review emphasised the need for practical examples to contribute to the knowledge building process of policy makers in inclusive education. The credibility and authenticity of the selected examples will be assessed by policy makers who can then consider the use of such policy and practice in the context of their own work.

Porter (2007) stresses that personnel acting on the basis of knowledge such as that provided by the examples must be confident that it accurately describes and explains the issues being addressed and will be beneficial to their practice.

The focus on evaluating the relevance of examples is supported by the work of Hammersley (2005) who highlights that there are several different kinds of evaluative judgment, which serve different purposes. These include:

- Assessing how well a study is presented, in terms of whether it is clear and provides all the information needed;
- Assessing the findings of a study to determine whether they should be believed.

The framework of criteria was intended to support this type of evaluation, bearing in mind that in any evaluation, 'tacit knowledge and judgment' will be brought to bear and too rigid application of criteria may discount what Pólya (2004) calls 'intelligent noticing'. Criteria, according to Hammersley (op. cit.), are a list of issues for threshold judgment to remind the reader what to take account of. As such, they are an aid, not a substitute for judgement (Seale, 2003).

Any criteria need to be sufficiently flexible to allow selection of examples that, while not providing a detailed plan for others, might suggest ideas for further consideration in other contexts. Examples will highlight policy and practice in line with the suggested actions of the Policy Guidelines that has been found to be effective in bringing about change and moving towards greater inclusion.

### **2.3 What does the literature say about the use of examples (or case studies) in (inclusive/special) education? How does this impact on the development and application of criteria?**

Yin (1994) states that case study methodology '*usually investigates a contemporary phenomenon within its real life context when the boundaries between phenomena and context are not clearly evident*' (p. 13). He notes, regarding case study research that in the absence of a theoretical position, there should be in place a general analytic strategy. Benbasat (1984) stresses that a case study should be more than an '*exercise in storytelling or an opinion piece*'.

In later work, Benbasat et al. (1987) say that case research is particularly appropriate for practice based problems where the experiences of the actors are important and the context of the action is critical and while there are many definitions and characteristics of case studies, there is broad agreement about its use in examining and disseminating practice in inclusive education.

The OECD Improving School Leadership activity (2006–2008) includes an innovative case study strand. The paper on case study methodology, which can be found at: [www.oecd.org/edu/schoolleadership](http://www.oecd.org/edu/schoolleadership) includes a useful summary of activity and states that the case studies can '*inform debate, guide innovative practice, provide reference and help frame school leadership policies in OECD countries*'. (p. 16)

Case studies of inclusive policy and practice, as stated above, vary widely in their understandings of 'inclusion' and their application of principles in different contexts. This



finding had to be taken into account when considering the development and application of criteria for the IEA project.

## **2.4 What similar criteria have been developed and used in (inclusive) education? How successful were they?**

Despite concerns that formalised criteria should not be over-prescriptive or applied mechanistically, a number of checklists, guidelines and lists of appraisal questions have been developed to assess the quality and applicability of qualitative research. (See CRD, 2009; Becker et al., 2006; What Works Clearinghouse, 2008; Bratlinger et al., 2005; Gersten et al., 2005; Cochrane Qualitative Research Methods Group, 2003; Patton, 2003; Health Care Practice Research and Development Unit, University of Salford, 2005; Spencer et al., 2003; Education Data and Policy Center/EPPI, 2009).

Cushing et al. (2008) developed an evaluation instrument, the *Program Quality Measurement Tool* (PQMT) that gives programme information specific enough to be acted on/replicated by administrators and educators. It also provides quantitative results so that progress can be directly measured and objective comparisons made. They suggest that it is only when inclusive practices are replicated and documented that the link between improved outcomes to specific practices can be made with confidence.

The OECD Improving School Leadership activity (op. cit.) frames questions to guide case study development and outlines a set of criteria for the selection of studies. Their core criteria include:

- The final set reflects the diversity of education governance systems, financing arrangements and political cultures of the countries represented in the activity;
- The full range of relevant stakeholders is involved;
- The practice focuses on educational results and reflects a clear theory of action grounded in the current literature with promise of achieving those results;
- The practice can demonstrate initial results that suggest that it is on track to achieve its intended outcomes;
- Full access to the site and to relevant data is afforded.

They then set out further criteria specific for examples of (a) models of school organisation and management that distribute leadership roles in innovative ways and (b) promising programmes and practices for the preparation and development of school leaders.

On a more general level, Pawson et al. (2003) developed the following criteria under the acronym of TAPUPAS:

- Transparency: is the process of knowledge generation open to outside scrutiny?
- Accuracy: are the claims made based on relevant and appropriate information?
- Purpose: are the methods used fit for purpose?
- Utility: are the knowledge claims appropriate to the needs of the practitioner?
- Propriety: has the research been conducted ethically and legally?
- Accessibility: is the research presented in a style that is accessible to the practitioner?
- Specificity: does the knowledge generated reach source specific standards?

Furlong and Onacea (2005) undertook a project that aimed to develop an understanding of quality that could assist the development of criteria appropriate for different types of applied and practice-based research. They note increasing pressure for closer links



between policy-making and practice but say that researchers still wish to contribute to theoretical knowledge rather than just 'applied' knowledge about 'what works'. They identify four sets of criteria:

- Epistemic, concerned with the trustworthiness of research findings and their contribution to existing knowledge;
- Technological, focusing in particular on the extent to which what is produced is fit for purpose;
- Practical, relating to whether the research facilitates wise, reflective practice;
- Economic, concerned for example with cost-effectiveness and marketability.

The Dutch Coalition on Disability and Development (DCDD, 2005) developed the following indicators of good practice for their projects:

1. Problem analysis and project formulation: inclusive policy approach and local participation;
2. Disability dimension: twin-track approach and structural attention to disability;
3. Social model of disability: disability as a human rights issue;
4. Involvement of people with disabilities: participation in project management and implementation;
5. Information and knowledge: capacity building and outreach;
6. Outcome: sustainability and inclusion.

These indicators of good practice reflect an ideal situation and many of the projects described by DCDD do not yet meet all indicators.

The European Schoolnet STEPS project (2008) produced a framework to analyse good practice case studies regarding the use of ICT. These include:

- How far they illustrate an identified typology (the main criterion);
- Approach (very national approach, national, regional approach, localised approach, institutional initiative, isolated initiative);
- Transferability (low, average, high);
- Exemplarity (low, average, high);
- Innovation (low, average, high);
- Impact (on organisational changes, pedagogical implications, student performance).

Hammersley (op. cit.) sets out the following considerations in assessing the adequacy of research reports:

1. The clarity of writing:
  - Are terms used consistently?
  - Are definitions provided where necessary?
  - Are sentences well constructed?
  - Is there use of excessive rhetoric?
2. The problem or question being addressed:
  - Is this clearly outlined?



- Is sufficient rationale provided for its significance?
3. The formulation of the main claims:
- Are these made clear?
  - Are the relations between subordinate and super-ordinate claims (including evidence) made sufficiently explicit?
  - Is the nature of each claim (as description, explanation, theory, evaluation, or prescription) indicated?
4. The formulation of the conclusions:
- Is there a distinction between main claims about the cases studied and general conclusions?
  - Is the basis for the conclusions made signalled?
5. The account of the research process and of the researcher:
- Is there sufficient, and not too much, information about the research process?
  - Is there sufficient, and not too much, information about the researcher? (In other words, is what is necessary and no more provided for assessing the validity of the findings, the value of the methods, the competence of the researcher, depending upon which is the focus.)

Cohen and Crabtree (2008) point out that instruments developed to support appraisal usually share some basic criteria, including the need for work to have been conducted ethically, the consideration of relevance to inform practice or policy and the use of appropriate and rigorous methods and the clarity and coherence of reporting.

A consideration of the work found relating to possible criteria resulted in a compilation of concepts and ideas. This is presented in the table in below which summarises the most commonly used criteria in the studies reviewed.

<b>Domain</b>	<b>Criteria</b>
Relevance and usefulness	Direct relevance/clearly exemplifies one/more suggested actions in UNESCO guidelines, content has potential use in other contexts
Ethical practice	Social model of disability (appropriate to context). Permissions/informed consent (where required), safety considerations re: all participants/staff, security of sensitive data
Diversity (national/policy contexts, settings, learners)	Geographical diversity – explanation of context and impact on/relevance to actions/outcomes. Diversity of settings/ages/backgrounds/abilities of learners
Clarity of information	Accessibility of writing, rationale (ref. to theory), clear aims/planned outcomes, info about staff and learners, settings etc.
Quality assurance and credibility	Evidence of monitoring and evaluation, minimum initial outcomes over reasonable time period, plausible/dependable outcomes (confirmed by external/independent source?) moving beyond intuition/preconceived ideas



Holistic practice/ collaboration	Involvement of full range of stakeholders incl. learners/service users, multi-agency joint working where appropriate
Originality	Innovative, tests out/adds to existing knowledge/understanding
Replication and transfer	Sufficient info for others to replicate, potential for transferring/generalising more widely/consideration of possible constraints and key issues
Sustainability	Consideration given to sustainable practice (not short term/heavily resource dependent initiatives)

This compilation was used within the IEA project for the development of the eventual framework of criteria. This is presented in the following section.



### 3. THE FRAMEWORK OF CRITERIA FOR IDENTIFYING EXAMPLES

Based on the review of available literature on the development of criteria for the selection of case studies, in education and in other relevant areas of work, an initial framework of criteria was drafted and presented to the Project Steering Group for discussion.

The first draft, included all the criteria most commonly used in the studies reviewed:

- Relevance and usefulness;
- Ethical practice;
- Diversity (of national/policy contexts, settings, learners);
- Clarity of information;
- Quality assurance and credibility;
- Holistic practice/collaboration;
- Originality;
- Replication and transfer;
- Sustainability.

The Project Steering Group considered a number of additional factors and discussed issues regarding the application of examples to the suggested policy actions. These discussions lead to a revised set of criteria which would be an effective practical tool for the IEA project and not solely based on theoretical work.

The essential revisions were as follows:

1. The deletion of the criteria 'replication and transfer' following discussions about the need for different responses across varied contexts, which meant that many practices could not be easily replicated.
2. The deletion of the criteria 'originality' as it was felt that the concept of was too heavily based on context and therefore not relevant for a project that aimed to provide information from across the globe.
3. 'Holistic practice/collaboration' was replaced by 'collaboration/partnerships' as this was felt to be more in line with the ethos of the UNESCO Policy Guidelines work.
4. The decision was made to drop 'ethical practice' from the criteria as this was felt to be an integral part of most work and would not, therefore, need to be a specific focus.
5. With regards to the 'relevance' criteria, an extensive discussion and review of project parameters was undertaken. Although the stated task of the project was to exemplify the suggested actions from the UNESCO Policy Guidelines document, it was felt that covering all the 51 actions would be too ambitious for the 2009/2010 one year project.

The Project Steering Group members from UNESCO therefore undertook to prioritise a smaller number of actions to serve as an initial focus for examples. The priority actions were selected on the basis of discussions about priorities, held at the UNESCO 2008 International Conference in Geneva and related to five broad areas of practice:

- Attitudinal changes and policy development;
- Inclusion through early childhood care and education;
- Inclusive curricula;



- Teachers and teacher education;
- Resources and legislation to support inclusion.

The 15 priority Suggested Actions selected were as follows:

<b>Suggested Actions</b>	
A1	Promote innovative programmes and support the community in its capacity to identify out-of-school children, youth and adults in order to get them into school and other education or training programmes
C2	Ensure that policies reflect rights-based and pro-poor approaches, and target disadvantaged children
C3	Support programmes for youth and adults
D1	Conduct awareness campaigns via media, posters, conferences and training
E4	Ensure that budget allocations support currently excluded groups
F3	Strengthen early childhood care and education provisions, linking them to inclusive approaches
H3	Provide incentives for the construction of accessible schools and elicit support from the private sector
I4	Ensure effective use of resources
J1	Provide support when needed and make curricula open and flexible, allowing for different learning styles and content that makes the curriculum relevant to learners and society
J4	Ensure that curricula do not focus only on academic skills
J5	Encourage new methods and new ways of learning
K1	Improve pre- and in-service training, mentorship and team-building
K3	Promote the use of new and alternative methods for teaching
K5	Encourage teachers to organise their work in teams and to apply problem oriented teaching methods as well as paying respect to diversity and different learning styles among their pupils
M1	Develop systems for monitoring and evaluation that relate to all levels (national, regional, local and private)

The eventual framework of criteria agreed upon for the IEA project was guided by the following principles:

- The need for *the criteria to be focussed upon the 'meta' issue of quality of information being made available* about the example being presented and not the perceived quality of the example being discussed within that information;



- The need for the criteria to be used for *the purpose of selecting examples that clearly exemplified the 15 selected suggested actions* and not used to select examples based on their perceived quality per se;
- The need for examples to be linked to the suggested actions presented in the IEA project to be used as an inspiration to design policy, or to critically examine already existing systems for inclusion.

In summary, the criteria for the IEA project have been identified in order to find ‘good examples of practice’ – with the emphasis on the quality of information provided – rather than examples of ‘good practice’ where judgements regarding the quality of the practice being described have to be made.

The final framework of criteria for the IEA project is presented in the table that follows.

Criteria	Description
Relevance	Information is provided about which actions (taken from UNESCO Policy Guidelines) the material exemplifies.
Diversity	Information is provided about the geographical, social and policy context including a definition/description of inclusion in the context of the case study country. Information about setting, ages, ethnic, cultural, linguistic backgrounds and abilities of learners should be included to allow judgements to be made regarding appropriate coverage of different aspects of diversity.
Clarity of information	<p>The following are clearly described:</p> <ul style="list-style-type: none"> <li>- Rationale (supported by theory) to explain significance of work (in context);</li> <li>- Issue to be addressed, aims and planned outcomes;</li> <li>- Methods, procedures and management of change;</li> <li>- Outcomes, feedback and reflections.</li> </ul> <p>Sufficient information must be included for readers to know if/how the content of the study might apply to their own situation.</p>
Quality assurance and credibility	Evidence is provided of monitoring, timescales, confirmation of outcomes by external/independent source and final evaluation.
Collaboration/partnerships	Full information on relevant partnerships and stakeholders is available, including who is involved and how.
Sustainability	Information is available regarding sustainable practice in the longer term, including actions, which are not heavily resource dependent.

In the next section, the application of the framework of criteria within the overall project is presented.



## **4. THE INCLUSIVE EDUCATION IN ACTION PROJECT**

The development of the framework of criteria for the project was conducted alongside other tasks during the IEA project. An overview of these activities is presented below in order to put the use of the framework of criteria within the project into a clear context.

### **4.1 Project Steering Group**

Overall project guidance has been provided by a panel of experts who acted as the IEA Project Steering Group (PSG). The PSG members included:

- Officers from UNESCO (Paris) and the UNESCO International Bureau of Education;
- Staff members from the European Agency for Development in Special Needs Education;
- Country representatives of the European Agency for Development in Special Needs Education;
- Experts in international approaches to inclusive education.

The role of the PSG has been to guide project decision-making and to give expert content inputs to the development of project outputs, crucially the framework of criteria. The PSG ensure that the project adheres to the project principles set out in this paper and achieves its stated aims.

### **4.2 The IEA website**

The main tool for sharing the IEA project information and specifically the examples linked to the suggested policy actions, is a web site: <http://www.inclusive-education-in-action.org>

The web site is being developed by the Institut für Technologie und Arbeit (ITA) (<http://www.ita-kl.de/ita/index.php?engl=1>) based at the University of Kaiserslautern, Germany. The website development has followed the principles of user centred design to ensure a high level of usability and accessibility for all.

The website summarises project information and then provides access to the examples and supporting materials, which are placed under different categories and presented from different points of view. Users are able to subscribe to the web site so they will get information on any changes. In addition, professionals considering submitting examples are able to read guidance on the submission process and also find information about policy areas for which examples are missing. In order to ensure that the site meets the needs of users, the web developers will carry out interviews and meet with focus groups at various stages of development to ensure that design ideas are appropriately adapted. ITA plan to measure the success of the website by a combination effectiveness, efficiency and satisfaction.

### **4.3 Disseminating the request for examples**

As has been previously described, the framework of criteria was developed with two purposes in mind:

- To guide the project staff team in the selection of examples that would effectively exemplify the suggested actions from the UNESCO Policy Guidelines document;
- Provide guidance to any professionals submitting examples for consideration.



The PSG agreed that the criteria would be written up as a template to guide people wishing to submit examples to be included in the IEA project. It was also agreed that the selection of examples would follow a two-stage process. At first, professionals would be invited through the UNESCO, Agency and other international networks to submit examples in a short form – but giving enough information to allow the project team to decide whether the example would be suitable. Initially examples would be requested to fit into 5 broader themes rather than the 15 identified suggested actions, as this should be easier for people to consider.

A short version of the template was drafted and trialled by some PSG members. However, the feedback from this process suggested that sub-headings were useful in structuring examples so a decision was made to add further sub-headings and develop just one version of the template. It was also recognised by the PSG that some examples – for example personal ‘stories’ – may not fit easily into a prepared template and that there was a need to retain some flexibility regarding its use. The PSG agreed, however, that the framework of criteria would be used as an ‘aid to judgment’ at all times. The need to take account of the geographical location and social/political context in particular was stressed as representing all global areas and contexts was considered a priority within the project outputs.

The PSG agreed to send an ‘open’ invitation for examples via their respective networks to see what the initial response might be. They also thought that it might be possible for PSG members to follow up examples themselves and write them in an appropriate format. They expressed the view that the invitation must be written in a way that would engage people and highlight the benefits of having an example published as part of the IEA project i.e. recognition, opportunities for networking and getting feedback from colleagues on an international level.

For the 2009/2010 project, the examples would need to be submitted in English only although supporting materials may be in any language. (Please note that it is hoped, as the project develops that materials can be translated into the 6 UNESCO languages.)

#### **4.4 Developing supporting materials**

Alongside the IEA project website, a number of print and electronic materials have been developed to support the collection of examples and also project dissemination activities.

These materials include:

- A comprehensive glossary of terms. This presents a number of key terms used throughout the project work along with a working definition of each agreed upon by the PSG members. The glossary is available in English from: <http://www.inclusive-education-in-action.org>;

- A synopsis of key information from the international conference ‘Inclusive education: a way to promote social cohesion’ held under the 2010 Spanish Presidency of the European Union. This international conference provides an example of the following suggested actions from the UNESCO Policy Guidelines document:

- A1 – Promote innovative programmes and support the community in its capacity to identify out-of-school children, youth and adults in order to get them into school, education, training programmes;

- C2 – Ensure that policies reflect rights-based and pro-poor approaches and target disadvantaged children;

- D1 – Conduct awareness campaigns via media, posters, conferences and training.



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The conference is presented in detail as a full example on the project website and a short flyer of key information has been produced in 25 languages in print and electronic formats (also available from the project website).

- A dissemination flyer of key IEA project information. This promotional flyer has been produced in 25 languages in print and electronic formats (also available from the project website).

All project materials can be downloaded from the project website: <http://www.inclusive-education-in-action.org>



## CONCLUSIONS

This report has outlined the methodology for developing the framework for analysis and provided details of the framework itself. The description of how examples have been selected for the IEA project is intended to give guidance on the consideration, selection and application of other examples in other settings and situations.

In line with the stated mission of both UNESCO and the European Agency for Development in Special Needs Education, the IEA project aims to gather, process and share information to extend knowledge and experience. This collaborative approach will help policy makers to identify and address key factors that support effective policy development and implementation.

It is hoped that the examples on the IEA website will help to move practice on and clarify the suggested actions by exemplifying innovative practice, prompting discussion and further innovation within the IEA network.

The IEA goal is that examples reflect real life in a range of contexts and impact on the development of inclusive practice by supporting reflection on facilitators and barriers to innovation and change. Macnab and Thomas (2007) state that it is the discourse and its form that are important in enabling good, productive inquiry: *It is the interplay of ideas, intuitions, tentative proposals, guarded propositions, statements and confirmations or refutations that is important* (p. 345). They suggest a 'reflexive and vigorous peer review community' is needed. The IEA project aims to support such a community.

The IEA project aims to support the development of a more inclusive education system. Schaeffer (2008) states that to achieve a truly inclusive education system, a rights-based approach is needed which has the following inter-related dimensions:

- The right to education – education granted to everyone without discrimination;
- Rights in education – rights of learners should be respected within the learning environment and be reflected in curricula, materials and methodologies;
- Rights through education – democratic values and respect for human rights should be promoted.

It is hoped that the Inclusive Education in Action project will provide a valuable resource for European and international policy makers working with within such an approach in order to develop equity and equal opportunities within education systems globally.



## **MORE INFORMATION ABOUT THE PROJECT PARTNERS**

### **United Nations Educational, Scientific and Cultural Organisation (UNESCO)**

UNESCO has developed the 'Policy Guidelines on Inclusion in Education' (see: <http://www.unesco.org/en/inclusive-education/guidelines>). The guidelines work to the principle that inclusive education is understood more broadly as a reform that is concerned with diversity among all learners. It is a process that involves the transformation of the entire education system.

Inclusive education is the responsibility of the Division for the Promotion of Basic Education, Section for Inclusion and Quality Enhancement.

Further information about UNESCO's work on inclusive education and developing quality education for all can be found at: <http://www.unesco.org/en/inclusive-education/>

or contact:

Section for Early Childhood Care and Education  
Division for the Promotion of Basic Education  
7, Place de Fontenoy, 75352, Paris SP, France  
Tel: +33 (0)1 45 68 097

### **European Agency for Development in Special Needs Education**

The Agency is an independent and self-governing organisation, established by member countries to act as a platform for collaboration between professionals and decision-makers at both national and European levels, on policies and practice in special needs education. The Agency is maintained by the Ministries of Education in member countries and also supported by the European Institutions (Commission and Parliament). The Agency's aim is to improve educational policy and practice for learners with special educational needs.

Further information about the work of the Agency can be obtained from the Secretariat:

European Agency for Development in Special Needs Education  
Østre Stationsvej 33  
DK-5000, Odense C, Denmark  
Tel: +45 64 41 00 20

or contact:

[secretariat@european-agency.org](mailto:secretariat@european-agency.org)

*For more information about the Inclusive Education in Action project, please contact: [info@inclusive-education-in-action.org](mailto:info@inclusive-education-in-action.org)*



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## ANNEX: POLICY GUIDELINES – SUGGESTED ACTIONS

Policy concerns	Policy questions	Gaps to be resolved	Suggested actions
<p>Needs analysis and diagnosis of needs must proceed the formulation of policies and plans</p>	<p><b>Enrolment of out-of-school children, youth and adults</b></p> <ol style="list-style-type: none"> <li>1. What is known about the present situation?</li> <li>2. Are many children out of school?</li> <li>3. Has youth been provided with appropriate education and training programmes?</li> <li>4. Can all adults in need of education be reached?</li> </ol>	<ol style="list-style-type: none"> <li>1. Lack of statistics and information on children who are out of school</li> <li>2. Who are the children not in school and why are they not enrolled?</li> <li>3. Encouraging youth to take part in education and training programmes that are relevant to them</li> <li>4. Reaching adults with relevant education and training programmes</li> </ol>	<p>A 1. Promote innovative programmes and support the community in its capacity to identify out-of-school children, youth and adults in order to get them into school and other education or training programmes</p> <p>A 2. Involve communities in services that reach out to adults in need of education</p> <p>A 3. Engage schools and communities in:</p> <ul style="list-style-type: none"> <li>- mapping households and identifying out-of-school children;</li> <li>- enrolment campaigns and community mobilization in partnership with local leaders.</li> </ul> <p>A 4. Provide support for mechanisms at local levels that aim at reaching out to children, youth and adults currently deprived of education</p>
<p>Systems and methods of collecting education-related data are necessary to inform policy and practice</p>	<p><b>Data system collection</b></p> <ol style="list-style-type: none"> <li>1. Does your country have appropriate data systems for the collection, maintenance and monitoring of information?</li> <li>2. Are education policies in your country built firmly on a system of information gathering involving participatory processes with children, youth and adults across the community?</li> </ol>	<ol style="list-style-type: none"> <li>1. Data systems are deficient</li> <li>2. Data collection is weak and sporadic and cannot be verified</li> <li>3. Planning is difficult without relevant data</li> <li>4. Lack of 'population mapping'</li> </ol>	<p>B 1. Build appropriate data systems at the national level</p> <p>B 2. Encourage use of household surveys</p> <p>B 3. Strengthen the capacity of local NGOs to collect data</p> <p>B 4. Involve local communities in data collection</p>

<p>Policies and plans must be pro-poor and stress the rights basis for inclusion</p>	<p><b>Inclusive education as a rights issue</b></p> <p>1. Do policies in your country promote inclusion as a human rights issue and use human rights as a justification for inclusive policies?</p>	<p>1. Lack of endorsement and implementation of rights instruments</p> <p>2. Children and youth in rural or hard-to-reach areas are still out of school</p> <p>3. Many adults have no access to educational programmes</p>	<p>C 1. Ensure that national legislation is in line with international conventions</p> <p>C 2. Ensure that policies reflect rights-based and pro-poor approaches, and target disadvantaged children</p> <p>C 3. Support programmes for youth and adults</p>
<p>Policies have rather unclear definitions. Inclusive education is seen primarily in terms of disability and 'special needs'</p>	<p><b>Definitions of inclusive education</b></p> <p>1. Are your country's policies based on a comprehensive definition of inclusive education?</p> <p>2. Do policies address the differences in concepts of 'special needs' education and inclusive education?</p>	<p>1. Lack of legislation on inclusive education</p> <p>2. Lack of policies related to inclusive education</p> <p>3. Lack of a precise concept</p>	<p>D 1. Conduct awareness campaigns via media, posters, conferences and training</p> <p>D 2. Involve communities and local leaders</p>
<p>Allocating funding to inclusive education is a challenge</p>	<p><b>Resource allocation</b></p> <p>1. Do policies in your country encourage budgeting that targets inclusive education, rather than sidelining inclusive education in a separate budget?</p>	<p>1. Budgets are fragmented and do not allocate resources efficiently</p> <p>2. Rigid regulations prevent resources from being attributed effectively where they are needed</p> <p>3. ECCE is not considered a priority and thus insufficient resources are allocated</p>	<p>E 1. Ensure effective planning and budgeting in the education sector and with other sectors of society</p> <p>E 2. Decentralize the use of funds within the education system</p> <p>E 3. Ensure that ECCE-related funding from different ministerial budgets (social, health education, etc.) is coordinated</p> <p>E 4. Ensure that budget allocations support currently excluded groups</p> <p>E 5. Allow flexible use of funds to support activities for inclusive schools, education and/or training programmes</p>
<p>Inclusive education is mainly presented as a set of separate</p>	<p><b>Holistic approach</b></p> <p>1. Do policies in your country view inclusive education as a way to change the entire</p>	<p>1. Separate and segregated provisions for different learners; costly parallel systems</p> <p>2. Provisions for certain</p>	<p>F 1. Ensure cross-sectoral planning for education</p> <p>F 2. Develop long-term policies for economic and social development to</p>



interventions for different groups of learners	<p>education system so that each learner is included in better quality education?</p> <p>2. Do policies present a vision of a system unifying formal, non-formal, mainstream and segregated provision?</p> <p>3. Do other sectors contribute to education (cooperation between sectors such as ministries and also with the private sector)?</p>	groups are not with the Ministry of Education	<p>achieve and sustain inclusive education objectives</p> <p>F 3. Strengthen ECCE provisions, linking them to inclusive approaches</p> <p>F 4. Involve the private sector in supporting education</p>
A holistic education system requires an information flow among professionals at different levels as well as between the school and families	<p><b>Communication between different levels of education</b></p> <p>1. Is there a systematic information exchange between different levels of education as well as between schools and parents?</p> <p>2. Have efforts been made to promote exchange of experiences among professionals?</p>	<p>1. There are problems and misunderstandings between staff at different levels of the education system (from early childhood onwards)</p> <p>2. There is lack of information flow from the various levels of education</p> <p>3. Changes in pedagogical approaches and teaching methods from one level to the next may be confusing to learners</p>	<p>G 1. Initiate meetings among staff to discuss and define roles and areas of cooperation</p> <p>G 2. Provide information on activities and experiences gained at lower levels</p> <p>G 3. Encourage sharing experiences through staff exchange</p>
Access to school buildings and curriculum	<p><b>Access</b></p> <p>1. Do children have easy access to school, particularly those living in remote areas and rural communities?</p> <p>2. Do youth and adults have access to education or training programmes?</p> <p>2. No policies indicate that school buildings must be accessible to everybody</p>	<p>1. Children often have to walk long distances to get to school</p> <p>2. Many schools have no ramps and/or sanitary facilities</p> <p>3. There are no uniform standards and directives for building schools that are accessible</p>	<p>H 1. Governments must ensure transport to and from schools when needed</p> <p>H 2. Encourage schools to build their own ramps and improve sanitary conditions</p> <p>H 3. Provide incentives for the construction of accessible schools and elicit support from the private sector</p>
Improving quality in education is not given as much attention as increasing enrolment rates	<p><b>Quality education</b></p> <p>1. Are your country's policies based on a strong understanding that improvements in access need to be matched with improvements in quality if</p>	<p>1. Lack of retention, high drop out and high repetition rates</p> <p>2. Inadequate learning outcomes</p>	<p>I 1. Adopt methods to assess learning outcomes</p> <p>I 2. Improve teaching methods</p> <p>I 3. Take account of cognition and cognitive</p>



and access	enrolment growth is to be maintained and drop-out rates reduced?		development I 4. Ensure effective use of resources
Curriculum reform needs to be more prominent and involve relevant stakeholders in the development of new and revised curricula	<p><b>Flexible curriculum development</b></p> <p>1. Do policies in your country encourage curriculum reforms built on stakeholder input?</p> <p>2. Do policies support local flexibility in curriculum development?</p>	<p>1. The curriculum is concentrating on academic skills and only assessing these skills</p> <p>2. Methods used are inflexible and only allow for one teaching style</p> <p>3. No contacts and cooperation with the community are foreseen in the curriculum</p> <p>4. The curriculum is prescriptive and non-flexible</p>	<p>J 1. Provide support when needed and make curricula open and flexible, allowing for different learning styles and content that makes the curriculum relevant to learners and society</p> <p>J 2. Involve the local community in teaching in local languages</p> <p>J 3. Include issues on early childhood programmes in the curriculum to secure easy transition</p> <p>J 4. Ensure that curricula do not focus only on academic skills</p> <p>J 5. Encourage new methods and ways of learning</p> <p>J 6. Initiate discussions in schools about teaching and learning processes</p>
Teacher education is often discussed in detail but not addressed in the context of promoting diversity.	<p><b>Teacher education</b></p> <p>1. Do policies in your country advocate radical reform of pre- and in-service teacher education in order to prepare teachers for inclusive approaches in education?</p> <p>2. Do they encourage a view of inclusive education as a natural way of working for every teacher?</p> <p>3. Do they ask the question 'who trains trainers?' and tackle the sensitive issue of well-established training institutes teaching out-of-date approaches?</p> <p>4. Do policies acknowledge the different</p>	<p>1. Lack of incentives and professional development of teachers</p> <p>2. Insufficient learning resources such as textbooks and learning materials</p> <p>3. Lack of materials that support the needs of particular groups of learners such as in Braille, sign language, easy reading materials</p> <p>4. Lack of mother tongue instruction</p> <p>5. Lack of gender-sensitivity and gender-responsiveness</p> <p>6. Teachers do not welcome diversity but</p>	<p>K 1. Improve pre- and in-service training, mentorship, teambuilding</p> <p>K 2. Provide teacher education for teachers at early grades and early literacy</p> <p>K 3. Promote the use of new and alternative methods for teaching.</p> <p>K 4. Encourage methods for planning education based on individual educational needs</p> <p>K 5. Encourage teachers to organize their work in teams and to apply problem oriented teaching methods as well as paying respect to diversities and different learning styles</p>



	pedagogical needs and methods used with children, youth and adults?	see it is a problem 7. Teaching staff is not yet familiar with the use of ICT	among their pupils K 6. Set up work with groups of mixed abilities to facilitate peer tutoring among pupils K 7. Encourage the use of new technology and ICT
Capacity development is important at all levels of the education system	<b>Capacity development</b> 1. Are there clear ideas expressed about the importance of continuous capacity development activities for all staff to ensure a continuous development of the quality of teaching? 2. Is there specific training for school managers (head teachers, directors)?	1. There is no structured planning for capacity building of educational staff as well as support staff in schools 2. No specific requirements have been established for capacity development of head teachers and inspectors of schools	L 1. Initiate the elaboration of capacity development plans for educational staff both at national, regional and local levels L 2. Develop a set of criteria for the requirements of capacities needed for school managers, inspectors and teachers
Monitoring and evaluation are necessary to improve planning and implementation	<b>Monitoring and evaluation</b> 1. Have clear expectations been set for the monitoring of schools and non-formal education activities and for evaluation of their results? 2. Does this apply to both regional and central authorities? 3. Do private schools form part of the monitoring and evaluation process?	1. Lack of policies or weak expectations on monitoring and evaluation 2. No monitoring or evaluation systems are put in place	M 1. Develop systems for monitoring and evaluation that relate to all levels (national, regional, local and private) M 2. Improve monitoring and evaluation of performance at schools and in non-formal education programmes M 3. Train and involve school heads and inspectors in assessment and evaluation M 4. Early identification of children at the risk of dropping out followed by analysis of the factors and conditions that constitutes this situation should be part of all evaluations



European Agency for Development in Special Needs Education

## European Agency for Development in Special Needs Education

The Agency is an independent and self-governing organisation, established by member countries to act as a platform for collaboration between professionals and decision-makers at both national and European levels, on policies and practice in special needs education. The Agency is maintained by the Ministries of Education in member countries and also supported by the European Institutions (Commission and Parliament). The Agency's aim is to improve educational policy and practice for learners with special educational needs.

### *More Information*

Further information about the work of the Agency can be obtained from:

European Agency for Development in Special Needs Education  
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[www.european-agency.org](http://www.european-agency.org)

More information on the Inclusive Education in Action project can be found at:  
<http://www.inclusive-education-in-action.org>  
or email: [info@inclusive-education-in-action.org](mailto:info@inclusive-education-in-action.org)



## UNESCO

UNESCO has developed the 'Policy Guidelines on Inclusion in Education' (see: <http://unesdoc.unesco.org/images/0017/001778/177849e.pdf>). The guidelines work to the principle that inclusive education is understood more broadly as a reform that is concerned with diversity among all learners. It is a process that involves the transformation of the entire education system.

Inclusive education is the responsibility of the Division for the Promotion of Basic Education, Section for Inclusion and Quality Enhancement.

### *More Information*

Further information about UNESCO's work on inclusive education and developing education for all can be found at:  
<http://www.unesco.org/en/inclusive-education/>

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