

# Guidelines for Inclusion:



## Ensuring Access to Education for All



United Nations  
Educational,  
Scientific and  
Cultural Organization

***Guidelines  
for Inclusion:***

**Ensuring Access  
to Education for All**



## **Acknowledgments**

In UNESCO's efforts to assist countries in making National Plans for Education more inclusive, we recognised the lack of guidelines to assist in this important process. As such, the Inclusive Education Team, began an exercise to develop these much needed tools. The elaboration of this manual has been a learning experience in itself. A dialogue with stakeholders was initiated in the early stages of elaboration of this document. "Guidelines for Inclusion: Ensuring Access to Education for All", therefore, is the result of constructive and valuable feedback as well as critical insight from the following individuals:

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**T**his report has gone through an external and internal peer review process, which targeted a broad range of stakeholders including within the Education Sector at UNESCO headquarters and in the field, Internal Oversight Service (IOS) and Bureau of Strategic Planning (BSP). These guidelines were also piloted at a Regional Workshop on Inclusive Education in Bangkok. A wide range of experts from the Asia Pacific region provided feedback for further development. Finally, this document was circulated to Steering Committee of the Flagship “The Right to Education for Persons with Disabilities: Towards Inclusion.” This document is a response to the need for a systematic approach for identifying excluded groups. It is intended to be a “*living document*” which serves as a dynamic tool of analysis which will be revised in the coming years to reflect the reality of marginalized and excluded children.

Over half a billion persons are disabled as a result of mental, physical or sensory impairment. These individuals are often limited by both physical and social barriers which exclude them from society and prevent them from actively participating in the development of their nations. Approximately 80 per cent of the world's disabled population lives in developing countries. The key to unlocking this potential rests in the minds of men; it is through education and the respect for the rights of all individuals that change can effectively take place.

Today there are an estimated 140 million children who are out of school, a majority being girls and children with disabilities. Among them, 90% live in lower middle-income countries and over 80% of these children are in Africa. There are countless others within the school system not receiving quality education. How many of these children who are not attending school live in your country? How can we take steps towards ensuring that these children, who have a right to education, are not left behind? This document provides guidelines and concepts for rendering National Education Plans / Education for All (EFA) more inclusive, with the objective of ensuring access and quality education for ALL learners.

This paper is intended to systematize how excluded children are planned for in education. It begins with a brief introduction, which provides a historical perspective on the origins of inclusion and describes the shift from integration towards inclusion. It is then divided into three main parts. The first provides a theoretical framework. It defines inclusion, explains how it is founded in a human rights approach and how it relates to factors such as quality and cost-effectiveness. The second part looks at more practical changes at the school level. It outlines the key elements in the shift towards inclusion with a particular focus on the key players including teachers, parents and educational policymakers as well as curricula. The third part brings together the first two sections by providing tools for policymakers and educational planners for hands-on analysis of education plans.

These guidelines are intended to provide information and awareness, to be a policy tool for revising and formulating EFA plans, and to serve as a basis for discussion among policymakers, educators, NGOs and international organizations impacting policy in both private and public education and concerned with promoting access for ALL learners.

These guidelines attempt to demystify the notions surrounding inclusion and demonstrate that challenges can be overcome through a willingness to change attitudes regarding inclusion. By following these guidelines, those working with and analyzing National Plans for Education can identify gaps and strategies in order to take steps to ensure that inclusion is achieved within their educational systems and that every child has access to a quality education.

<b>Introduction</b>	<b>9</b>
1 Inclusion's Origins in Special Education: The Shift from Integration to Inclusion	<b>9</b>
2 How Inclusion Relates to <i>Education for All</i>	<b>9</b>
<b>1 Why Inclusion –</b>	
<b>RATIONALE &amp; RIGHTS</b>	<b>II</b>
1 Inclusion in Education – a human right	<b>I2</b>
Figure 1.1: The Rights Framework for Inclusion	
2 How is inclusion defined?	<b>I4</b>
3 Inclusion – how does it relate to quality?	<b>I6</b>
4 Inclusion and cost effectiveness	<b>I7</b>
<b>2 Key Elements in the Shift towards Inclusion –</b>	
<b>RESOURCE &amp; RECOURSE</b>	<b>20</b>
1 Key players in support of inclusion – who are they?	<b>2I</b>
2 Attitudes and values – how can they affect inclusion?	<b>22</b>
Figure 2.2: Understanding the process of inclusion	
3 Accessible and flexible curricula – how can they serve as keys to schools for all?	<b>25</b>
Figure 3.1: Education through the Inclusion Lens	
4 Inclusion – empowering for All?	<b>28</b>
<b>3 Inclusive Education and Education for All –</b>	
<b>REFLECTION &amp; REFORM</b>	<b>29</b>
1 Tools for Educational Planners and Policymakers	<b>30</b>
2 Steps Towards Inclusion Checklist	<b>3I</b>
3 Strategic Planning for Inclusion - Inclusion Matrix Worksheet	<b>34</b>
<b>Annex 1 EFA &amp; Millennium Development Goals</b>	<b>37</b>
<b>References and further reading</b>	<b>39</b>

## 1 Inclusion's Origins in Special Education: The Shift from Integration to Inclusion

Inclusion as we know it today has its origins in Special Education. The development of the field of special education has involved a series of stages during which education systems have explored different ways of responding to children with disabilities, and to students who experience difficulties in learning. In some cases, Special education has been provided as a supplement to general education provision, in other cases it has been entirely separate. In recent years, the appropriateness of separate systems of education has been challenged, both from a human rights perspective and from the point of view of effectiveness.

Special education practices were moved into the mainstream through an approach known as “integration”. The main challenge with integration is that “mainstreaming” had not been accompanied by changes in the organisation of the ordinary school, its curriculum and teaching and learning strategies. This lack of organisational change has proved to be one of the major barriers to the implementation of inclusive education policies. Revised thinking has thus led to a re-conceptualisation of “special needs”. This view implies that progress is more likely if we recognize that difficulties experienced by pupils result from the ways in which schools are currently organized and from rigid teaching methods. It has been argued that schools need to be reformed and pedagogy needs to be improved in ways that will lead them to respond positively to pupil diversity – seeing individual differences not as problems to be fixed, but as opportunities for enriching learning.

## 2 How Inclusion relates to Education for All?

The issue of inclusion has to be framed within the context of the wider international discussions around the United Nations organisations' agenda of “Education for All” (EFA), stimulated by the 1990 Jomtien Declaration.

“The Salamanca Statement on Principles, Policy and Practice in Special Needs Education” (UNESCO 1994) provides a framework for thinking about how to move policy and practice forward. Indeed, this Statement, and the accompanying Framework for Action, is arguably the most significant international document that has ever appeared in special education. It argues that regular schools with an inclusive orientation are:

“...the most effective means of combating discriminatory attitudes, building an inclusive society and achieving education for all.”

In the early documentation on EFA, there was a rather token mention of “special needs”

This has been gradually replaced by a recognition that the inclusion agenda should be seen as an essential element of the whole EFA movement. In taking an inclusive approach we must not lose sight of its origins in special needs discourse as well as the fact that children with disabilities remain the largest group of children out of school.

*Education for All* means ensuring that all children have access to basic education of good quality. This implies creating an environment in schools and in basic education programmes in which children are both able and enabled to learn. Such an environment must be inclusive of children, effective with children, friendly and welcoming to children, healthy and protective for children and gender sensitive. The development of such child-friendly learning environments is an essential part of the overall efforts by countries around the world to increase access to, and improve the quality of, their schools.”



# 1 Why Inclusion? – Rationale & Rights

**E**xclusion from meaningful participation in the economic, social, political and cultural life of communities is one of the greatest problems facing individuals in our society today. Such societies are neither efficient nor desirable.

Despite encouraging developments, there are still an estimated 115-130 million children not attending school. Ninety percent of them live in low and lower middle income countries, and over 80 million of these children live in Africa.<sup>1</sup> As alarming are the countless others within the school system being excluded from quality education. Among those who do enrol in primary school, large numbers drop out before completing their primary education.

Current strategies and programmes have not been sufficient to meet the needs of children and youth who are vulnerable to marginalisation or exclusion. In the past, efforts have consisted of specialized programmes, institutions and specialist educators. The unfortunate consequence of such differentiation, although well intended, has often been further exclusion. Achieving the EFA and Millennium Development Goals<sup>2</sup> by their assigned time lines will require unprecedented intersectoral and interagency collaboration among partners. Education must be viewed as a facilitator in everyone's human development and functionality, regardless of barriers of any kind, physical or otherwise. Therefore, disability of any kind (physical, social and/or emotional) cannot be a disqualifier. Inclusion, thus, involves adopting a broad vision of *Education for All* by addressing the spectrum of needs of all learners, including those who are vulnerable to marginalisation and exclusion.

*Some examples of Marginalised/Excluded/Vulnerable Groups are:*



<sup>1</sup> International Consultative Forum on Education for All, 2000.

<sup>2</sup> See annex for a list of goals.

# 1 Inclusion in Education– a human right

UNESCO views inclusion as “*a dynamic approach of responding positively to pupil diversity and of seeing individual differences not as problems, but as opportunities for enriching learning.*”

Therefore, the move towards inclusion is not simply a technical or organisational change but also a movement with a clear philosophy. In order for inclusion to be implemented effectively, countries need to define a set of inclusive principles together with practical ideas to guide the transition towards policies addressing inclusion in education. The principles of inclusion that are set out in various international declarations can be used as a foundation. These then can be interpreted and adapted to the context of individual countries.

At the core of inclusive education is the human right to education, pronounced in the Universal Declaration of Human Rights in 1948 which states,

“Everyone has the right to education... Education shall be free, at least in the elementary and fundamental stages. Elementary education shall be compulsory. Education shall be directed to the full development of human personality and to the strengthening of respect for human rights and fundamental freedoms. It shall promote understanding, tolerance and friendship among all nations, racial or religious groups, and shall further the activities of the United Nations for the maintenance of peace.” (art.26 - Universal Declaration of Human Rights)

Equally important are the provisions of the Convention on the Rights of the Child (UN, 1989), such as the right of children not to be discriminated against, stated in Article 2 and Article 23. Article 23 stipulates that children with disabilities<sup>3</sup> should have:

“*effective access to and receive education, training, health care services, rehabilitation services, preparation for employment and recreation opportunities in a manner conducive to the child’s achieving the fullest possible social integration and individual development, including his or her cultural and spiritual development.*” (Article 23)

Article 29 on the “Aims of education,” expresses that the educational development of the individual is the central aims and that education should allow children to reach their fullest potential in terms of cognitive, emotional and creative capacities. In addition, the UNESCO Convention Against Discrimination in Education (1960) and the Convention on the Elimination of All Forms of Discrimination against Women (1979) are other key international human rights treaties that not only emphasize the prohibition but also the active elimination of discrimination. A logical consequence of these rights is that all children have the right to receive the kind of education that does not discriminate on any grounds such as caste, ethnicity, religion, economic status, refugee status, language, gender, disability etc. and that specific measures be taken by the State to implement these rights in all learning environments.

A rights-based approach to education<sup>4</sup> is founded upon three principles:

- ◆ Access to free and compulsory education
- ◆ Equality, inclusion and non-discrimination
- ◆ The right to quality education, content and processes

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3 The *General Assembly resolution 56/168* of 19 December 2001 established an Ad Hoc Committee “to consider proposals for a comprehensive and integral international convention to promote and protect the rights and dignity of persons with disabilities, based on the holistic approach in the work done in the fields of social development, human rights and non-discrimination and taking into account the recommendations of the *Commission on Human Rights* and the *Commission for Social Development*.” The Committee is in the process of working on a Comprehensive and Integral International Convention on Protection and Promotion of the Rights and Dignity of Persons with Disabilities.

4 Tomasevski, K. (2004) *Manual on Rights Based Education*, UNESCO Bangkok

The move towards inclusion has involved a series of changes at the societal and classroom level that have been accompanied by the elaboration of numerous legal instruments at the international level. Inclusion has been implicitly advocated since the Universal Declaration in 1948 and it has been mentioned at all stages in a number of key UN Declarations and Conventions. (As seen in the following Figure 1.1: The Rights Framework for Inclusion)

While there are also very important human, economic, social and political reasons for pursuing a policy and approach of inclusive education, it is also a means of bringing about personal development and building relationships among individuals, groups and nations. The Salamanca Statement and Framework for Action (1994) asserts that:

*“Regular schools with inclusive orientation are the most effective means of combating discrimination, creating welcoming communities, building an inclusive society and achieving education for all.”* (Salamanca Statement, Art. 2)

The Jomtien World Conference on Education for All (1990) set the goal of Education for All (EFA). UNESCO, along with other UN agencies, international development agencies and a number of international and national non-governmental organisations, has been working towards achieving this goal - adding to the efforts made at the country level.

*“All children and young people of the world, with their individual strengths and weaknesses, with their hopes and expectations, have the right to education. It is not our education systems that have a right to certain types of children. Therefore, it is the school system of a country that must be adjusted to meet the needs of all children.”* (B. Lindqvist, UN-Rapporteur, 1994)

It is thus imperative that schools and local authorities take the responsibility to ensure that this right is implemented. Concretely this involves:

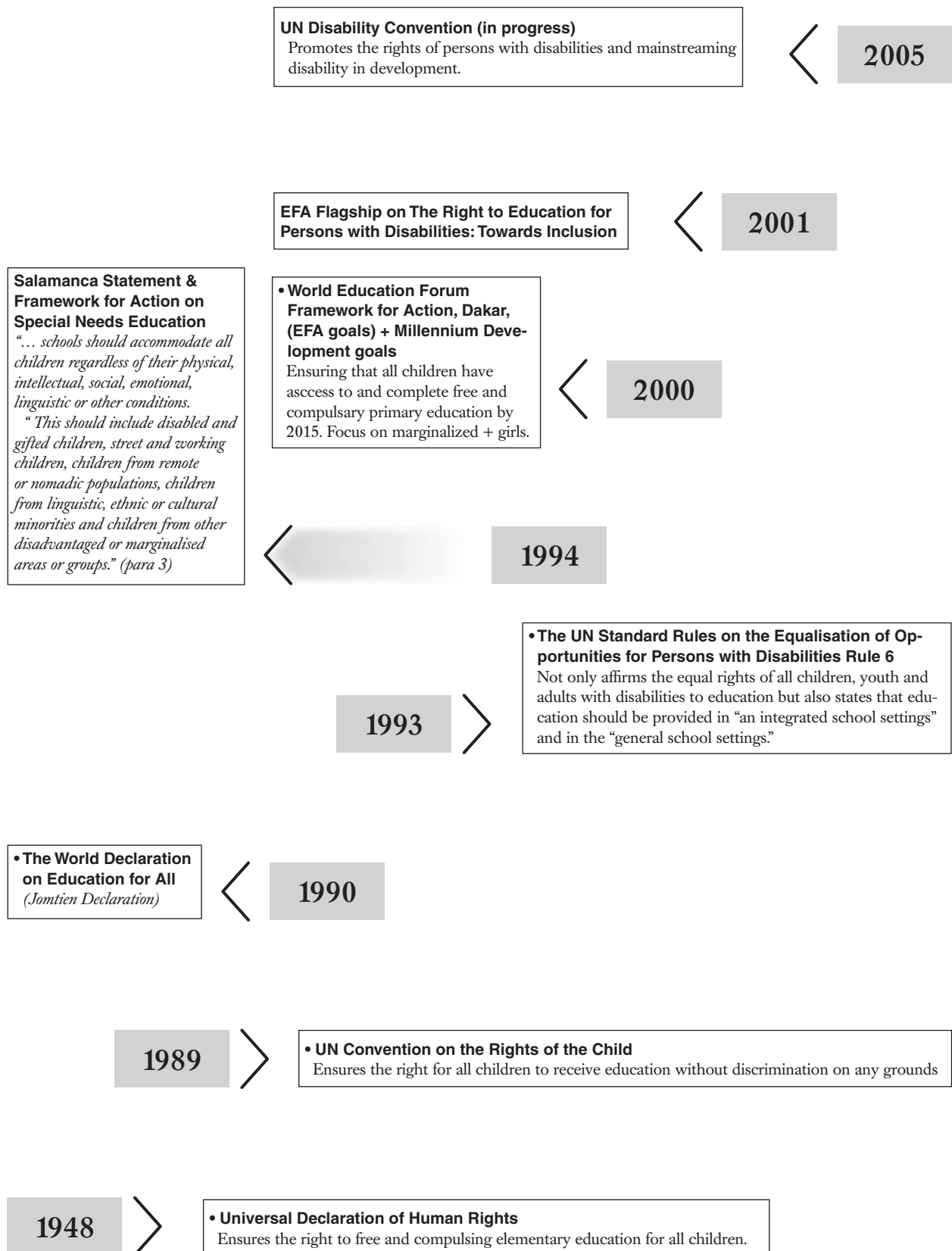
- ◆ Initiating debates around how the community understands human rights;
- ◆ Generating collective thinking and identifying practical solutions such as how human rights can be made part of the local school curriculum;
- ◆ Linking the Human Rights movement with educational access;
- ◆ Fostering grassroots action and strengthening its ties to the policy level in order to promote protection;
- ◆ Encouraging the creation of community and children’s councils where issues of access can be discussed; and
- ◆ Developing community-school mechanism to identify children not in school as well as develop activities to ensure that children enroll in school and learn.

Furthermore, adequate resources must be matched with political will, and constituent pressure maintained on governments to live up to their obligations. Ultimately, however, success will be judged by the quality of basic education provided to all learners. In the following sections we discuss how inclusion is defined and what practical steps are required to make inclusion in education a reality.

## 2 How is inclusion defined?

Inclusion is seen as **a process** of addressing and responding to the diversity of needs of all learners through increasing participation in learning, cultures and communities, and reducing exclusion within and from education. It involves changes and modifications in content, approaches, structures and strategies, with a common vision which covers all children of the appropriate age range and a conviction that it is the responsibility of the regular system to educate all children.

**Figure 1.1: The Rights Framework for Inclusion**



Inclusion is concerned with providing appropriate responses to the broad spectrum of learning needs in formal and non-formal educational settings. Rather than being a marginal issue on how some learners can be integrated in mainstream education, inclusive education is an approach that looks into how to transform education systems and other learning environments in order to respond to the diversity of learners. It aims towards enabling teachers and learners both to feel comfortable with diversity and to see it as a challenge and enrichment of the learning environment, rather than a problem. Inclusion emphasizes providing opportunities for equal participation of persons with disabilities (physical, social and/or emotional) whenever possible into general education, but leaves open the possibility of personal choice and options for special assistance and facilities for those who need it.

In defining inclusion, it is important to highlight the following elements:

Inclusion IS about:	Inclusion is NOT about:
☺ welcoming diversity	☹ reforms of special education alone, but reform of both the formal and non-formal education system
☺ benefiting all learners, not only targeting the excluded	☹ responding only to diversity, but also improving the quality of education for all learners
☺ children in school who may feel excluded	☹ special schools but perhaps additional support to students within the regular school system
☺ providing equal access to education or making certain provisions for certain categories of children without excluding them	☹ meeting the needs of children with disabilities only  ☹ meeting one child's needs at the expense of another child

In particular, four key elements have tended to feature strongly in the conceptualisation of inclusion. The four elements are as follows:

- ◆ *Inclusion is a process.* That is to say, inclusion has to be seen as a never-ending search to find better ways of responding to diversity. It is about learning how to live with difference and learning how to learn from difference. In this way differences come to be seen more positively as a stimulus for fostering learning, amongst children and adults.
- ◆ *Inclusion is concerned with the identification and removal of barriers.* Consequently, it involves collecting, collating and evaluating information from a wide variety of sources in order to plan for improvements in policy and practice. It is about using evidence of various kinds to stimulate creativity and problem-solving.
- ◆ *Inclusion is about the presence, participation and achievement of all students.* Here “presence” is concerned with where children are educated, and how reliably and punctually they attend; “participation” relates to the quality of their experiences whilst they are there and, therefore, must incorporate the views of the learners themselves; and “achievement” is about the outcomes of learning across the curriculum, not merely test or examination results.

- ◆ *Inclusion involves a particular emphasis on those groups of learners who may be at risk of marginalization, exclusion or underachievement.* This indicates the moral responsibility to ensure that those groups that are statistically most “at risk” are carefully monitored, and that, where necessary, steps are taken to ensure their presence, participation and achievement in the education system.

It is important to highlight that a holistic view of the education system, encompassing both the private and public system, must be taken when considering adopting an inclusive approach. Increasingly the world over, privatisation of education is on the rise. It is becoming evident that the private system of education in many countries is “competing” with the Government system. In some cases, government schools are closing because children are increasingly attending private schools. This trend could inadvertently lead to planners only planning for schools catering to poorer communities; this would inevitably be counterproductive to promoting principles of inclusion. Furthermore, in many countries the public system is generally considered lower in terms of quality of education being provided as compared to private schools. Thus, poorer children tend to be limited to the public system. It is imperative, therefore, that education planners consider both the public and the private system in planning in order to effectively address the needs of *all* learners and combat exclusion.

The move towards inclusion is a gradual one that should be based on clearly articulated principles, which address system-wide development. If barriers are to be reduced, as we will discuss later in this paper, policy-makers, educational personnel and other stakeholders need to take certain steps which must involve all members of the local community, including political and religious leaders, local education offices and the media. Some of these actions include:

- ◆ Mobilising opinion
- ◆ Building consensus
- ◆ Carrying out local situation analyses
- ◆ Reforming legislation
- ◆ Supporting local projects

In short, promoting inclusion is about improving educational and social frameworks to cope with new trends in educational structures and governance. It involves improving inputs, processes and environments to foster learning both at the level of the learner in his/her learning environment as well as at the level of the system which supports the learning experience. In the following section we will look at how inclusion and quality are related.

### **3 Inclusion – how does it relate to quality?**

According to the 2005 Global Monitoring Report, “Education should allow children to reach their fullest potential in terms of cognitive, emotional and creative capacities.”

An inclusive approach to education is one that strives to promote quality in the classroom. In order to move towards quality in education, changes are required at several levels. Human variations and differences are a naturally occurring and valuable part of society and should be reflected in schools. Schools should be able to offer opportunities for a range of working methods and individualized learning in order that no pupil is obliged to stand outside the fellowship of and participation in the school.

An inclusive school for all must put flexibility and variation at the centre, structurally as well as in terms of content, with the goal of offering every individual a relevant education and optimal opportunities for development.

Characteristics of “a school for all” include exercising flexibility with regard to the individual pupil’s capabilities and placing his/her needs and interests at the core. The school for all is therefore a coherent, but differentiated learning environment. All knowledge and experience about the development of children says that this can best take place in an environment where self-esteem and positive conception of oneself are strong, i.e. an environment where real participation and fellowship are experienced and actively promoted.

Placing the pupil at the centre does not imply that students need to be taught and will learn subject matter and content separately. Within the framework of the classroom, individual adaptations can be made. Furthermore, it involves pupils supporting one another according to their abilities and strengths. It is about seeing differences as opportunities for learning.

Nonetheless, quality in education is often perceived and measured as the academic results attained by the pupils through the successful completion of final exams and other quantitative measures. In some cases, privatized systems of education focus on provisions of good infrastructure, technology and facilities aiming at assuring “comfort” to students. These therefore become parameters of quality rather than “content and value” of education. Quality, however, is more than this and entails a school system where all children are welcome and where diversity and flexibility are seen as important ingredients for the development and personal growth of all learners. Educational planners must bear these issues in mind when generating discussions among receivers and providers in order to remove disparities in “quality” of education in the public and private systems.

An inclusive perspective on quality education is concerned with the need to ensure that learning opportunities contribute to effective inclusion of individual and groups into the wider fabric of society. Quality education is therefore education that is inclusive as it aims at the full participation of all learners. We have learned from constructive and transactional theories that the quality of learning can be enhanced by the diversity of student involvement. Teacher attitudes and tolerance are the vehicles for the construction of an inclusive and participatory society. Focusing on quality education for enhanced inclusion implies identifying strategies for overcoming or eliminating the barriers to full participation for individuals and groups which experience discrimination, marginalization and exclusion or which are particularly vulnerable.

#### **4 Inclusion and cost effectiveness**

According to a recent World Bank study and a growing body of global research, Inclusive Education is not only cost-efficient but also cost-effective and “equity is way to excellence”<sup>5</sup> This research likewise points to increased achievement and performance for all learners. Furthermore, within education, “countries are increasingly realizing the inefficiency of multiple systems of administration, organisational structures and services and the financially unrealistic option of special schools.”<sup>6</sup>

One area where efficiency can be improved to yield results is in the realm of school health. UNESCO along with its partners, WHO, UNICEF and the World Bank joined forces in the development of the FRESH<sup>7</sup> initiative aimed at raising the education sector’s awareness

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5 Skrtic OECD, 1999 in Peters.

6 Dyson & Forlin, in Peters.

7 Focus Resources on School Health

of the value of implementing an effective school health, hygiene and nutrition programmes as one of its major strategies to achieve Education for All. According to recent findings cited by the FRESH initiative, as a result of universal basic education strategies, some of the most disadvantaged children - girls, the rural poor, children with disabilities - are for the first time having access to school. However, their ability to attend school and to learn while there is compromised by poor health. These are the children who will benefit most from health interventions, since they are likely to show the greatest improvements in attendance and learning achievement. School health programmes can thus help modify the effects of socio-economic and gender-related inequities.” They also help create learning-friendly environments which ensure greater equity and better educational outcomes . Furthermore, school health programmes help link resources of the health, education, nutrition and sanitation centers in an infrastructure - the school – that is already in place, is persuasive and sustained. The effectiveness of this is measurable not only in terms of educational outcomes, reduced wastage less repetition but generally enhanced returns on educational investment.

Inclusive education is about improving learning environments but also about providing opportunities for all learners to become successful in their learning experiences. A range of resources (e.g. teaching materials, special equipment, additional personnel, new teaching approaches or other learners) can provide support in the task of learning. “Support” refers to all of these resources and, in particular, those resources beyond what the teacher can provide.

The cost of education is a critical issue to all school systems, especially when creating education facilities for all learners. Often questions are raised about the costs of education for traditionally excluded groups. It is falsely perceived as being costly when it is often only about making minor adjustments to accommodate all learners. Furthermore, there is a risk that with privatisation, education is becoming more of a “commercial” venture. This may in turn lead to “cost-cutting” in areas that are essential for educational access for all.

If we adopt a holistic perspective of society, it is more relevant to ask about the costs to society when it does *not* provide education for all children. In such a context, it is clear that the most cost effective solution is to offer education to all children. Education is the fundamental basis upon which the survival of the human race and development of a nation depend; it is an important investment where no compromises should be made. Therefore, systems need to consider minimizing wastage of resources and using resources optimally in making education cost effective, rather than focusing on cost cutting measures.

One example that illustrates this is that schools with high repetition rates often fail to work in preventive ways, which in the long term is both inefficient and costly. The expenditure incurred by schools that have high rates of repetition in many cases would be better used to provide additional support to learners who encounter difficulties in education. Such preventive activities could minimize repetition and be less costly than the expenditure incurred by learners, for instance, who require seven or eight years to complete a four or five-year cycle of education.

A recent study entitled, “Investing in the Future: Financing the Expansion of Educational Opportunity in Latin America and the Caribbean”, looked at the role that repetition plays in the number and share of expected primary and secondary school years. It shows that repetition accounts for more than one-quarter of the total number of school years in Brazil. Other countries where repetition accounts for a large share of the total volume of school years are Uruguay (10.5%), Costa Rica (8.7%) and Peru (6.8%).



Such unnecessary repetition is detrimental to those students themselves, as they often fall behind, drop-out of school and require additional support when they resume their studies. Repetition impacts negatively on students who could benefit from additional support in the classroom rather than having such resources utilized in the same way, without success, ostensibly for their benefit.

Several cost-effective measures to promote Inclusive Education have been developed in countries with scarce resources. These include: (a) trainer-of-trainer models for professional development; (b) linking university students in pre-service training institutions with schools for their clinical experiences; (c) converting special needs education schools into resource centers to provide expertise and support to clusters of general education schools; building capacity of parents and linking with community resources; utilizing children themselves in peer programs.

In short, providing education for all learners in schools and offering extra support to those encountering difficulties should reduce the need of costly repetition in schools and considerably reduce societal costs of supporting these individuals later on in life.

## **2 Key elements in the shift towards inclusion – Resource & Recourse**

**I**ncorporating inclusion as a guiding principle typically requires change in education systems, and this change process is frequently faced with several challenges. It involves important shifts and changes at the systems as well as the societal level.

To understand change at all levels, it is important to know what change looks like from different points of view. How the teacher, student, local and national government see change is vital to understand how individuals and groups act and, indeed, react to each other. Reforming school systems to become inclusive is not only about putting in place recently-developed inclusive policies that meet the needs of all learners, but also about changing the culture of classrooms, schools, districts and universities etc. It is important to note that these change processes towards inclusion often begin on a small scale and involve overcoming some obstacles such as:

- ◆ Existing attitudes and values
- ◆ Lack of understanding
- ◆ Lack of necessary skills
- ◆ Limited resources
- ◆ Inappropriate organisation

Accepting change is really about learning. It means that schools should foster environments where teachers learn from experience in the same way that they expect their pupils should learn from the tasks and activities in which they are engaged. Teachers who regard themselves as learners in the classroom are more likely to successfully facilitate the learning of their pupils. The sensitivity they acquire as a result of reflecting on their own attempts to learn new ideas or new ways of working is influential in terms of the way children are dealt with in their classes.

There are several important conceptual elements that contribute to successful change. These include:

- ◆ Clarity of purpose
- ◆ Realistic goals
- ◆ Motivation
- ◆ Support
- ◆ Resources
- ◆ Evaluation

There are several levels and dimensions to the educational change process, some of which are intangible. “Good change processes develop trust, relevance and the desire to get better results. Accountability and improvement can be effectively interwoven, but it requires great sophistication.”<sup>8</sup> However, it is important to recognize that some dimensions of change can effectively be measured. Such measurements include:

- ◆ Direct benefits to children
- ◆ Wider impact on policies, practices, ideas and beliefs
- ◆ Enhanced children's participation
- ◆ Reduced discrimination (e.g. gender, disability, caste, minority status, etc)
- ◆ Strengthened partnerships and improved collaboration between ministries, at the national and local level of government and at the community level
- ◆ Development and strengthening of the education system, technology and pedagogy to include all learners

The following sections will explore some of these additional barriers and supports to change. The theoretical ideas and examples below are useful when trying to understand the barriers to change when implementing inclusive policies and practices.

## 1 Key players in support of inclusion – who are they?

Teachers, parents, communities, school authorities, curriculum planners, training institutes and entrepreneurs in the business of education are among the actors that can serve as valuable resources in support of inclusion. Some (teachers, parents and communities) are more than just a valuable resource; they are the key to supporting all aspects of the inclusion process. This involves a willingness to accept and promote diversity and to take an active role in the lives of students, both in and out of school. The optimal learning environment for inclusion depends largely upon the relationship among teachers, parents, other students and society. Ideally, effective inclusion involves implementation both in school and in society at large.

However, it is only rarely that such a symbiosis exists between the school and society. Thus, it is the regular teacher who has the utmost responsibility for the pupils and their day-to-day learning. Nevertheless, it is the responsibility of the Ministry of Education to ensure that school-accessible and child-centered programmes are elaborated, implemented and evaluated. The outcome of such programmes and the results of their evaluation will facilitate new incentives and ideas for teaching.

The discussion of a pupil's progress and difficulties should involve the pupil and the pupil's parents. No matter how successfully a child is taught at school, participation of the family, and in some cases the community, is deemed indispensable if one aims at ensuring that the child's school learning is applied at home and in other real-life daily settings.

Family members and communities can be important resources - when informed, stimulated, entrusted and prepared in effective ways. Efforts should not be spared when guiding and directing families in work that is supportive to their child. It is often a great challenge to get the families of the most marginalised learners involved.

At a primary school in Durban, South Africa, teachers use grandmothers as a resource to develop the reading abilities of the children. Grandmothers have been trained to listen to children read and to encourage them to interact with texts. Twice a week, grandmothers come to the school and work with groups of children in the playground or under a tree. This also frees up the teachers to work with children who may be experiencing difficulties in learning and who may need individual attention from the teacher.

*Source: Inclusive Schools and Community Support Programmes, UNESCO.*

## 2 Attitudes and values – how can they affect inclusion?

It has been shown that teachers' positive attitudes towards inclusion depend strongly on their experience with learners who are perceived as "challenging". Teacher education, the availability of support within the classroom, class size and overall workload are all factors which influence teachers' attitudes. Several studies have revealed that negative attitudes of teachers and adults (parents and other family members) are the major barrier to inclusion; children do not have prejudices unless adults show them. Thus, introducing inclusion as a guiding principle in these different areas will have implications for teachers' attitudes.

Shared values make cooperation possible, just as lack of them makes it difficult for people to work together. However, when common values are lacking, common interests, which are precursors to values, may substitute for them and in daily life are often a significant driving force.<sup>9</sup> Changes in attitudes involve significant changes in conceptions and role behaviour. Among other factors, this is why change is so difficult to achieve.

One successful example of a first experience with inclusive schooling was in Burkina Faso through the "Inclusive schools and community support programmes" project which, according to those involved, "contributed to tackling the problem of education of children with special educational needs, marginalized for too long, as well as to changing attitudes regarding these children." A genuine new awareness on the part of parents and students was created. The pupils themselves observed such changes. One of them indicated that, "He was afraid to approach his comrades with intellectual disabilities, because it was said that they were inhabited by spirits and could contaminate you." Now, he concluded, "I know that is not true. Now, we work and play together and I've learned to understand them, to like them and to help them when necessary."

*Source: Inclusive Schools and Community Support Programmes, UNESCO.*

Negative attitudes towards differences and resulting discrimination and prejudice in society manifests itself as a serious barrier to learning. However, it is a barrier that can be overcome through the practice of inclusion and is not a necessary pre-cursor to the process.

There are many misconceptions surrounding inclusion that often serve as obstacles to adopting an inclusive approach at the policy level which will be discussed in greater detail in the last section. Among them are:

- ◆ Inclusion is costly
- ◆ Implementing inclusion needs societal change in attitudes first
- ◆ Inclusion is a positive theoretical concept, but is not practical
- ◆ Inclusion requires special skills and capacities that are difficult to develop
- ◆ Inclusion is the responsibility of the Social Ministry and not of the Ministry of Education
- ◆ Inclusion is a disability-specific issue

Overcoming these misconceptions about inclusion is one of the challenges to change. Furthermore, in the process of changes required for incorporating inclusion as a guiding principle, conflict and disagreement can occur. This is both inevitable and is fundamental

to successful change. Individuals involved in a change process may require some pressure to change, but change will only be effective when they are able and allowed to react to form their own positions on the change process. In many cases, policymakers, parents, teachers and other stakeholders in the school need to realise that inclusion is a process which requires changes at both the level of the education system as well as the school level. This can be challenging to accept as it may involve readjusting conceptual understandings and may have multiple practical consequences. “Some deep changes are at stake when we realise that people’s basic conceptions of the school system are involved, i.e. their occupational identity and sense of competence.”<sup>10</sup>

The diagram on the following page traces the stages of understanding in the move towards inclusion. It demonstrates that the attitudes in society direct the actions, level of commitment and services provided to traditionally excluded groups. However, this schema is merely an example of a general process, which may differ from country to country. (See Figure 2.2: Understanding the process of Inclusion)

An example of this in China, is the Golden Key Project, which promotes education for the visually impaired in poor rural areas. For each county, a professional guidance network has been set up including an itinerant supervisor, an administrative official and a social worker who are responsible for creating the link between the school and the community and have been able to successfully mobilize community forces to support inclusion. Initially resistance was encountered among members of the community and teachers who argued that they were not specially trained or equipped to handle these students. Others claimed that these pupils would slow their classes down and that the parents of the other children would not be pleased to know that their children were in classes with these children who are “different”. However, once this transition to change was overcome, teachers came to recognise the contribution to the learning environment as well as the implications for the community. Eventually, even the most sceptical villagers were convinced of the importance of sending blind children to school and banded together to help support these children by volunteering to repair the path they used to go to school and provide them with other support services.<sup>11</sup>

*Source: Inclusive Schools and Community Support Programmes, UNESCO.*

The implementation of more inclusive systems of education is possible if schools themselves are committed to becoming more inclusive. The development of enabling mechanisms such as national policies on inclusion, local support systems and appropriate forms of curriculum and assessment are important in creating the right context for the development of inclusion. Inclusion has important benefits for all children as it produces schools with more enriching learning environments that view diversity as a positive force which must be acknowledged and celebrated. Inclusion produces schools that move away from rote learning and place greater emphasis on hands-on, experienced based, active and co-operative learning.

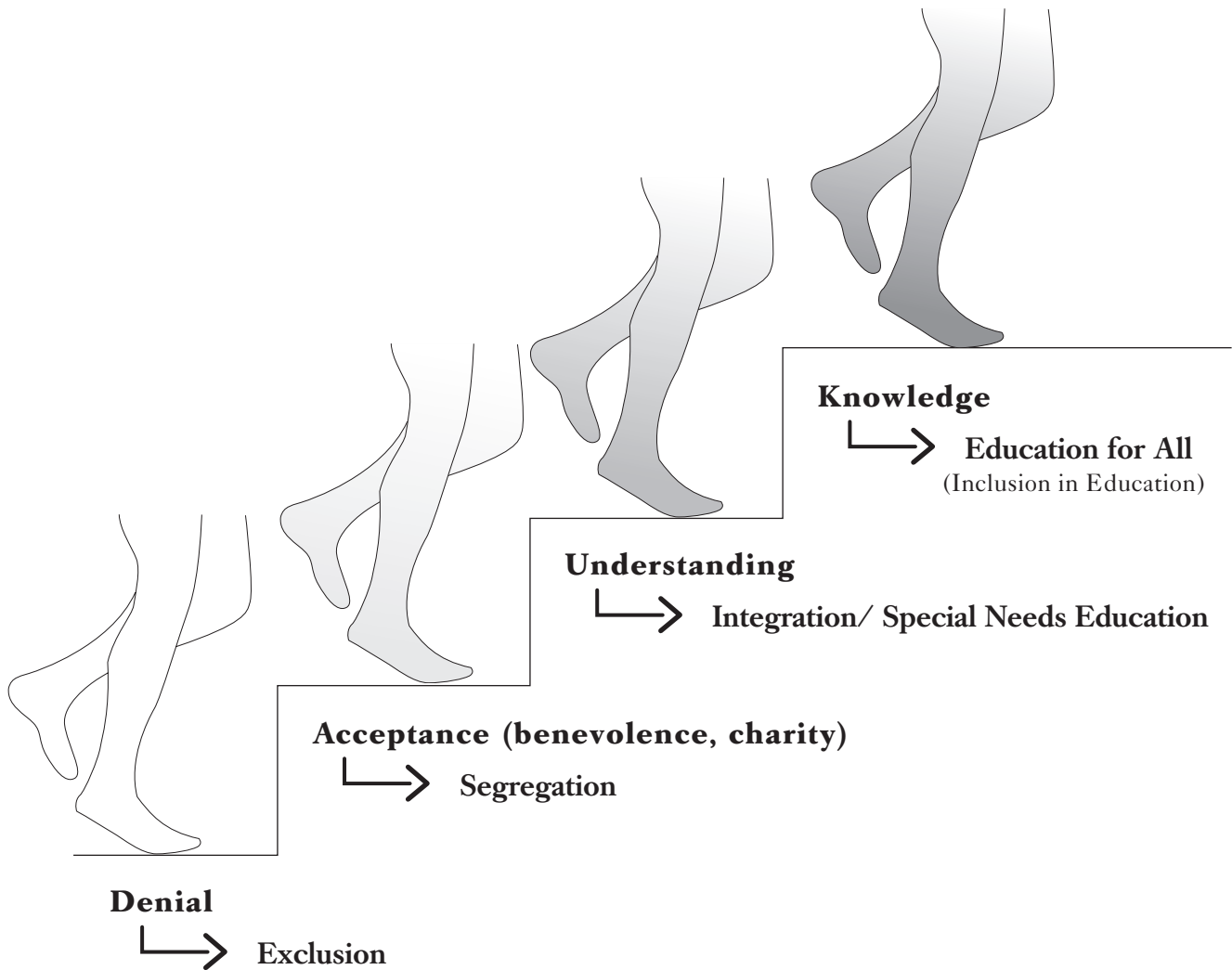
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10 Meisfjord, R.

11 UNICEF, 2003, Inclusive Education Initiatives for Children with Disabilities: Lessons from the East Asia and Pacific Region.

**Figure 2.2: Understanding the Process of Inclusion**

**Ensuring the Right to Education for ALL**



**Steps from Exclusion to Inclusion**

### 3 Accessible and flexible curricula – how can they serve as keys for schools for all?

UNESCO's work on quality and relevance of education is based on the premise that educational quality and access are intricately linked. The concept "Education for All" thus questions a large part of the current school's way of organizing teaching. Teachers often retain the perspectives gained from their own school experiences.

According to the 2005 EFA Report, "One way to move towards a relevant, balanced set of aims is to analyse the curriculum in terms of inclusion. An inclusive approach to curriculum policy recognizes that while every learner has multiple needs – even more so in situations of vulnerability and disadvantage – everyone should benefit from a commonly accepted basic level of quality education. In the United Kingdom, a government supported "Index for Inclusion" identifies three dimensions of inclusion: creating inclusive cultures, producing inclusive policies and evolving inclusive practices.<sup>12</sup>

Schools often have general, common goals regarding what is desirable in terms of pupil achievement. An inclusive approach seeks to discourage teaching which is based on a criterion of averages, meaning that some pupils will not be able to keep up, while others will find it "too easy" and consider the teaching boring. Instead, *Education for All* places the pupil at the centre of teaching and learning based on an appreciation of his or her differences in understanding, feelings, social and perceptual skills, etc. This results in all pupils having optimal opportunities for becoming motivated and activated.

Accessible and flexible curricula can serve as the "key" to creating "schools for all". It is important that the curriculum be flexible enough to provide possibilities for adjustment to individual needs and to stimulate teachers to seek solutions that can be matched with the needs and abilities of each and every pupil.

Many curricula expect all pupils to learn the same things, at the same time and by the same means and methods. But pupils are different and have different abilities and needs.

Therefore, the curriculum must take into consideration the various needs of pupils to ensure "access for all". Some of these strategies are:

- ◆ providing a flexible time-frame for pupils studying particular subjects
- ◆ giving greater freedom to teachers in choosing their working methods
- ◆ allowing teachers the opportunity of giving special support in practical subjects (e.g. orientation, mobility) over and above the periods allotted for more traditional school subjects.
- ◆ allotting time for additional assistance for classroom-based work
- ◆ emphasizing aspects of pre-vocational training

Furthermore, some practical steps can be taken towards making curricula more inclusive. Some of the questions to consider are:

- ◆ What human values promoting inclusion are being fostered through the curriculum?
- ◆ Are human rights and children's rights part of the curriculum? Do they address the coexistence of rights with responsibilities, and how are they taught?
- ◆ Is the content of the curriculum relevant to children's real lives and future?
- ◆ Does the curriculum take gender, cultural identity and language background into consideration?

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12 Booth and Ainscow, 2000

- ◆ Does the curriculum include environmental education?
- ◆ Are teaching methods child-centered and interactive?
- ◆ How is feedback gathered/integrated for curriculum revision?
- ◆ How is the curriculum related to national assessment systems?
- ◆ To what extent are the education authorities responsible for monitoring the school in tune with the curriculum revisions and transactions?

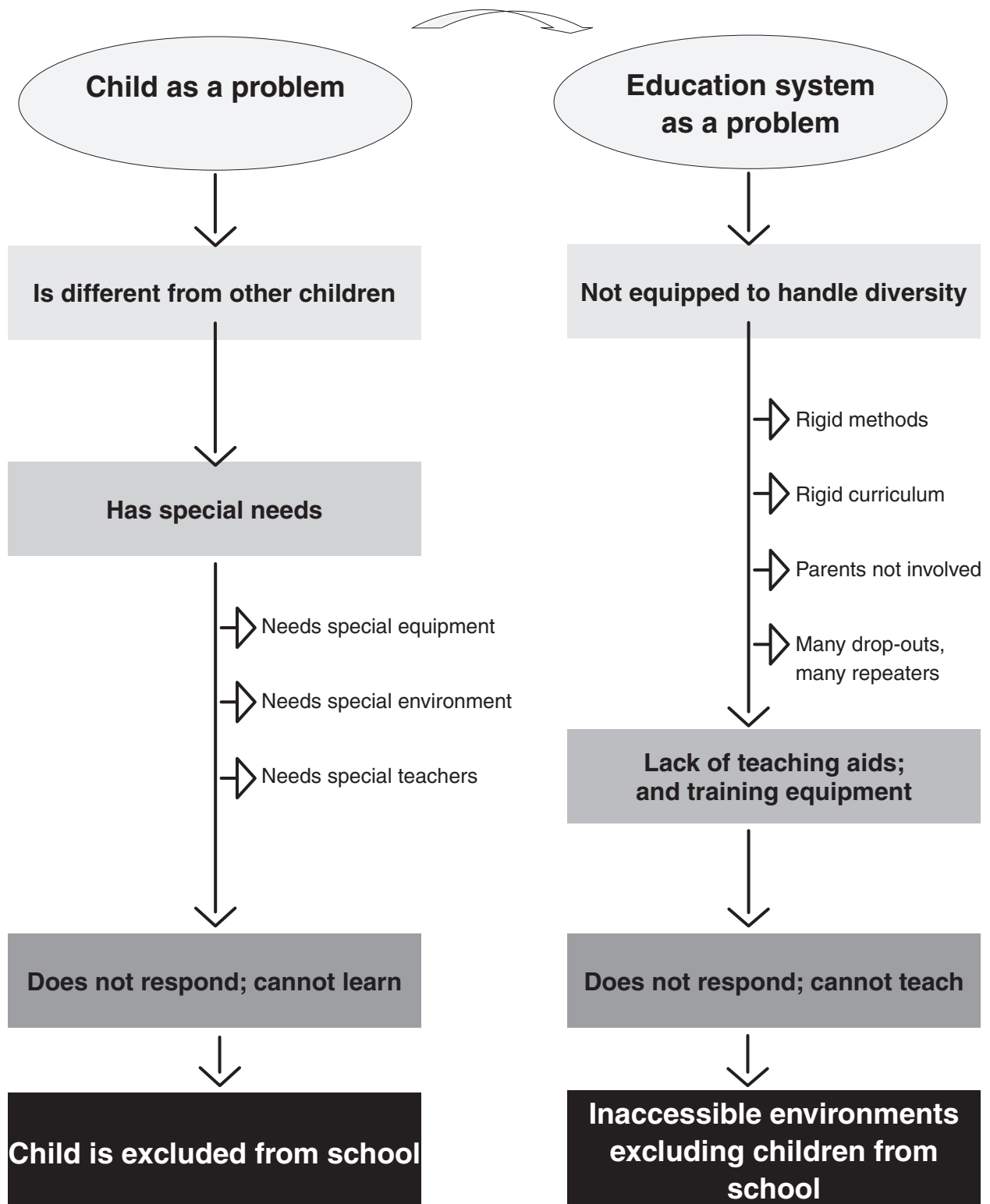
Together with flexible curricula, flexible teaching-learning methodology should be introduced. Making this a reality involves other changes in policy including shifting away from long, theoretical, pre-service-based teacher training to greater, continuous, in-service capacity building. Schools often need to be assisted in modifying subject matters and working methods, and this should be linked to appropriate skills training.

Looking at education through an inclusive lens implies a shift from seeing the child as a problem to seeing the education system as a problem. Initial views, which emphasized that the source of difficulties in learning came from within the learner, ignored the environmental influences on learning. It is now being strongly argued that reorganizing ordinary schools within the community, through school improvement and a focus on quality, ensures that all children can learn effectively, including those categorized as having special needs. *See Figure 3.1: Education through the Inclusion Lens*



**Figure 3.1: Education through the Inclusion Lens**

*Seeing education through the inclusion lens implies a shift from seeing the child as a problem to seeing the education system as the problem that can be solved through inclusive approaches*



## 4 Inclusion – empowering for All?

According to a recent report for the World Bank Disability Group, “Education is widely seen as a means to develop human capital, to improve economic performance and to enhance individual capabilities and choices in order to enjoy freedoms of citizenship.”<sup>13</sup> Within this context, therefore, empowerment refers to “acquiring the awareness and skills necessary to take charge of one’s own life chances. It is about facilitating the ability of individuals (and groups) to make their own decisions and, to a greater extent than hitherto, to shape their own destinies.” Some educational theorists tie the concept to Freire’s notion of “the collective struggle for a life without oppression and exploitation” and the expression of students’ and teachers’ “voices” which can be emancipatory in different degrees.<sup>14</sup> This is the understanding of empowerment embedded in these guidelines.

Social transformation requires self-formation. Curriculum can play an instrumental role in fostering tolerance and promoting human rights. It is the means by which respect for the dignity of persons and awareness of responsibilities as national and global citizens are instilled in children. Such knowledge can be a powerful tool for transcending cultural, religious and other diversities and empowering teachers, students and all members of society.

Furthermore, education is an important vehicle through which economically and socially marginalized adults and children can be empowered to change their life chances, and obtain the means to participate more fully in their communities.

The advantage of inclusion versus special education has been demonstrated on several levels. Studies in both OECD and non-OECD countries indicate that students with disabilities achieve better school results in inclusive settings. Inclusive education also provides opportunities to build “social networks, norms of reciprocity, mutual assistance and trustworthiness”. Special schools tend to perpetuate the segregation of disabled people, yet, for students with some types of disabilities, provision of high quality education in special schools may be more appropriate than “inclusion” in a regular school that does not provide meaningful interaction with classmates and professionals. Another option is to reconcile the inclusive and specialised approaches in a “twin track” approach in which parents and learners decide whether to opt for an inclusive regular school or a special school initially, with inclusive education remaining the ultimate goal.<sup>15</sup>

When communities can hold teachers, administrators, and government officials accountable for the inclusion of all children through formal institutional mechanisms, community members become more interested in school improvement and more willing to commit their own resources to the task. This commitment may include forming partnerships with outside contributors. According to the World Bank, “programs that expand the access of excluded groups to education have led to important shifts in mind-set among community members and government leaders regarding the contributions that those groups can make to society”<sup>16</sup>. This is where change processes and empowerment go hand in hand to move towards inclusion for all learners.

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13 Peters, Susan.

14 Giroux, H.

15 Nordström, Richler, Magrab, Wormnaes (2004) in EFA Global Monitoring Report, The Quality Imperative, 2005.

16 World Bank, 2004

## 4 *Inclusive Education and Education for All*

The Dakar Framework For Action acknowledges the major education conferences throughout the 1990s, such as the Salamanca World Conference on Special Needs Education (1994 Salamanca, Spain), and urges the international community to continue working on achieving the goals set (Dakar Framework for Action, Para 4.). The “Expanded Commentary on the Dakar Framework for Action’ describes the broad vision of Education for All. This vision needs to be adopted in order to achieve the Dakar Framework for Action goals. It places a special emphasis on those learners who are the most vulnerable to marginalization and exclusion and identifies Inclusive Education as one of the key strategies to address issues. The Dakar Framework for Action thus clearly sets inclusive education as one of the main strategies to address the question of marginalization and exclusion. “The fundamental principle of EFA is that all children should have the opportunity to learn. The fundamental principle of Inclusive Education is that all children should have the opportunity to learn together.”<sup>17</sup>

It is important to highlight that Education for All does not automatically imply inclusion. Inclusion properly understood is precisely about reforming schools and ensuring that every child receives quality and appropriate education within these schools. To this extent, inclusion is critical to the EFA movement since without it, a group or groups of children are excluded from education. Thus, EFA by definition cannot be achieved if these children are excluded. Both EFA and inclusion are both about access to education, however, inclusion is about access to education in a manner that there is no discrimination or exclusion for any individual or group within or outside the school system.

Toward this end, inclusion needs to be the fundamental philosophy throughout programmes so that the goal of “Education for All” can be achieved. Inclusion, therefore, should be the guiding principle for UNESCO and other agencies’ interface with Governments and other providers on Education for All.

In his speech to the 160th Executive Board, the Director General of UNESCO highlighted the need to make the special and urgent needs of marginalized and excluded groups an integral part of all UNESCO’s programmes so as to enable the Organization to make a more effective contribution.

UNESCO’s actions in promoting inclusive approaches in education will aim at:

- ◆ forging a holistic approach to education which ensures that the concerns of marginalized and excluded groups are incorporated in all education activities, and cooperating to reduce wasteful repetition and fragmentation;
- ◆ developing capacities for policymaking and system management in support of diverse strategies towards inclusive education; and
- ◆ bringing forward the concerns of groups who are currently marginalized and excluded.

# 1 Tools for Educational Planners and Policymakers – Reflection & Reform

In conclusion, we have looked at how inclusion is defined, some reasons and justifications for its implementation as well as some key elements in the shift towards inclusion. We now ask that you consider the following questions at the level of policy and legislation in greater detail before engaging in an in-depth analysis of the educational plans:

- ◆ What policies promote inclusion and which ones go against it?
- ◆ What are the existing barriers at the policy level that can act as a deterrent to the practice of inclusion and how can this issue be addressed?
- ◆ How can suitable guidelines to address and facilitate inclusion be prepared and followed?
- ◆ How can debate and discussion be generated among relevant stakeholders to promote inclusion?
- ◆ How can monitoring mechanisms be formulated and incorporated into plans and realistic goals set for achieving intended targets?

There are some indicators to determine whether your school system is on track to moving towards inclusion. The Centre for Studies on Inclusive Education (CSIE) piloted and refined and *Index for Inclusive Schooling*. The Index takes the social model of disability as its starting point, builds on good practice, and then organizes the Index work around a cycle of activities which guide schools through stages of preparation, investigation, development and review.<sup>18</sup>

## Index for Inclusive Schooling

- 1.1 Pupils are entitled to take part in all subjects and activities
- 1.2 Teaching and learning are planned with all pupils in mind
- 1.3 The curriculum develops understanding and respect for differences
- 1.4 During lessons all pupils participate
- 1.5 A variety of teaching styles and strategies is used
- 1.6 Pupils experience success in their learning
- 1.7 The curriculum seeks to develop understanding of the different cultures in society
- 1.8 Pupils take part in the assessment and accreditation systems
- 1.9 Difficulties in learning are seen as opportunities for the development of practice

The checklist and matrices that follow are intended to help facilitate the process of identifying gaps and corresponding strategies to address these gaps and move towards inclusion.

## **2 Steps towards inclusion Checklist**

The questions below can be used as a checklist to promote the incorporation of inclusive approaches in National Education Plans. The answers will serve as a background when analysing the present status of the National Plan and the level of its inclusiveness. Findings can be used in discussions with responsible education authorities. Furthermore, they should be used as guidelines in advising on possible improvements in the National Education Plans.

The findings should serve as a source for the identification of the needs for capacity building for Inclusive Education.

The questions have been “grouped” under two headings to facilitate a structure for the analysis of the National Education Plans / EFA plans. If the plan is still in draft form, then responding to the checklist below can provide some insight into areas that need to be elaborated in order to make the plans more inclusive. If the plan has already been completed, then the responses to these questions can serve as a guide to amending the plan based on addressing the issues that may have been overlooked during the initial planning process.

## **3 Strategic Planning for Inclusion – Inclusion Matrix Worksheet**

The worksheet which follows the Checklist Questions, is intended as a tool to help identify and analyze your current situation including your strengths (e.g., available resources that currently support inclusion; statement(s) on inclusion in your National /EFA Plan) and needs (e.g., resources that are needed to support inclusion, challenges that need to be overcome; gaps in your Plan or your system related to moving toward inclusion).

## **Checklist Questions**

### **A. Situation analysis**

1. Have studies, needs-based analyses, etc. been undertaken to identify and address the needs and challenges of the children missing out on education or at risk of dropping out? If so, what are the findings?
2. Are any measures being taken with regard to data collection, indicators and statistics to ascertain the magnitude of marginalized and excluded children in the country?
3. What accommodations in teaching are made to ensure access for children with disabilities, ethnic and language minorities?
4. What capacity exists to build and strengthen community level involvement (eg. CBR, C-EMIS, ECCD initiatives)?

### **B. Policy, goals, objectives**

1. Which are the main action programmes in regard to marginalized/excluded/vulnerable groups? Is there specific mention made of particular groups? Are children with disabilities and other groups specifically planned for?
2. Are there specific policies/programmes/strategies in place to identify out-of-school children, provide speed-up and/or second chance educational opportunities? Are there specific family-based strategies to support them on a financial and/or emotional basis?
3. What are the linkages between formal and non-formal education in the plans/programmes for more inclusive education?
4. Do current educational policies favor particular groups at the expense of marginalized ones? If so, in which ways? Does this create obstacles to inclusion?
5. Is there any policy statement with regard to excluded groups? Are any particular groups specified?
6. Is there a policy statement regarding language of instruction?
7. Is there language with negative connotations referring to excluded/marginalized groups? If so, how can this be changed?
8. What kind of priorities are reflected in the country's objectives of education? Do these priorities stimulate or discourage inclusion?
9. Does the plan include provisions or measures regarding access to the curriculum for all learners?
10. Does the plan include provisions or measures regarding physical access to school for all learners?
11. Is reference made to UN declarations, the Salamanca Statement, the Dakar Framework of Action? The Convention on the Rights of the Child?
12. Are references made to quality of/in education?
13. Does the plan address required competence and quality of teachers in relation to inclusion?
14. What are the main objectives and targets for the education described in the plan? Does the plan make reference to the EFA and/or Millennium Development Goals?

### **C. Implementation**

1. Who are the partners/service providers in the provision of education (other Ministries, private, etc)? Does the responsibility of education for certain categories of children lie with other Ministries?
2. How are education costs shared? Do parents/family have to assume direct and/or indirect costs for the educational process of their children?
3. Is education regarded as a Right for all children? Are there mechanisms to ensure that this right be fulfilled? Is there an Ombudsperson or mechanism for the implementation of the Rights of the Child?
4. Is the curriculum flexible enough to allow for appropriate adaptation? Does it alienate certain social and cultural groups? Does it permit progression and accreditation for all students?
5. Do the plans reflect the readiness to deal with disasters or events that affect access to education?

### **D. Monitoring and evaluation**

1. Is registration data collected on all children which would allow identification of those not in school?
2. Are there mechanisms to identify children already in schools, but excluded from quality education?
3. Does the plan establish a school-community mechanism to identify children not in schools, and are ways identified to ensure they enroll and learn? Are children encouraged to identify peers in the community not in school?
4. Do the plans discuss flexibility in the assessment procedures to evaluate learning?

### **E. Capacity-building/stakeholder involvement/participation**

1. Which stakeholders (parents, pupils, managers, etc) have been consulted in the elaboration of the plan?
2. How do international conferences, research, etc. feed into policies and programming?
3. In which ways are parents/communities expected to be involved? To what extent are parents/communities supported, how and by whom?
4. Are there social mobilization and communication strategies/materials to support and create public awareness for inclusion?
5. What resources are allocated for plans/programmes with regard to inclusion? What are additional sources of support for education (private sector, community, bi-lateral, etc)?
6. Are pupil participation and co-operative learning encouraged?

## Planning Matrix

<b>Indices of Inclusion</b>	<b>Situation Analysis</b>  What is the current situation?	<b>Policy Goals, Objectives</b>  What actions are needed?	<b>Implementation</b>  How will the actions be taken and by whom <sup>25</sup> ?	<b>Monitoring, Evaluation</b>  What information needs to be collected, how will you know what has been achieved?
References to Inclusive Education in National EFA Plans				
References to vulnerable/marginalized/excluded groups. Specific references to children with disabilities?				
Linkage with National Programming Frameworks (CCA-UNDAF, PRSPs) and other sector-wide approaches				
Legislation and Policies				
Physical Infrastructure, transportation and facilities				
Training				

<sup>25</sup> This entails cooperation with other Ministries as well as bi-lateral and multi-lateral donors, including private sector.



<b>Indices of Inclusion</b>	<b>Situation Analysis</b>  What is the current situation?	<b>Policy Goals, Objectives</b>  What actions are needed?	<b>Implementation</b>  How will the actions be taken and by whom <sup>25</sup> ?	<b>Monitoring, Evaluation</b>  What information needs to be collected, how will you know what has been achieved?
Activities				
Curriculum Development				
Additional activities supporting Inclusion (workshops, training, awareness raising campaigns, materials)				
International Treaties, Tools, etc (To what extent are they recognised?)				
Community and Non-formal Education (What are the linkages with formal education)				
Examinations, Assessment (of students and teachers)				

## EFA Goals

### Education for All Goals

1. Expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children;
2. Ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities, have access to a complete free and compulsory primary education of good quality;
3. Ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life skills programmes;
4. Achieving a 50 per cent improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults;
5. Eliminating gender disparities in primary and secondary education by 2005, and achieving gender equality in education by 2015, with a focus on ensuring girls' full and equal access to and achievement in basic education of good quality;
6. Improving all aspects of the quality of education, and ensuring excellence of all so that recognized and measurable learning outcomes are achieved by all, especially in literacy, numeracy, and essential life skills.

### Millennium Development Goals

- Goal 1: Eradicate extreme poverty and hunger – halve the number of people living on one dollar a day and who suffer from hunger.
- Goal 2: Achieve universal primary education
- Goal 3: Promote gender equality and empower women – equal access to primary and post-primary education for girls.
- Goal 4: Reduce child mortality
- Goal 5: Improve maternal health
- Goal 6: Combat HIV/AIDS, malaria and other diseases
- Goal 7: Ensure environmental sustainability – reduce by half those without access to safe water.
- Goal 8: Develop a global partnership for development – more aid, more debt relief, access to essential drugs and good governance.

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