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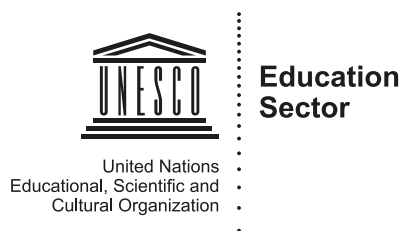
A guide for ensuring inclusion and equity in education



A guide for ensuring inclusion
and equity in education

UNESCO Education Sector

Education is UNESCO's top priority because it is a basic human right and the foundation on which to build peace and drive sustainable development. UNESCO is the United Nations' specialized agency for education and the Education Sector provides global and regional leadership in education, strengthens national education systems and responds to contemporary global challenges through education with a special focus on gender equality and Africa.



The Global Education 2030 Agenda

UNESCO, as the United Nations' specialized agency for education, is entrusted to lead and coordinate the Education 2030 Agenda, which is part of a global movement to eradicate poverty through 17 Sustainable Development Goals by 2030. Education, essential to achieve all of these goals, has its own dedicated Goal 4, which aims to *"ensure inclusive and equitable quality education and promote lifelong learning opportunities for all."* The Education 2030 Framework for Action provides guidance for the implementation of this ambitious goal and commitments.



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Foreword

Including all learners and ensuring that each individual has an equal and personalized opportunity for educational progress is still a challenge in almost every country. Despite commendable progress made over the past two decades to expand access to basic education, further efforts are needed to minimize barriers to learning and to ensure that all learners in schools and other learning settings experience a genuine inclusive environment.

The 2030 Agenda for Sustainable Development, with its focus on leaving no one behind, provides a unique opportunity to build more inclusive and equitable societies. This should start with inclusive education systems.

Sustainable Development Goal (SDG) 4 on education calls for inclusive and equitable quality education and lifelong learning opportunities for all by 2030. It emphasizes inclusion and equity as laying foundations for quality education and learning. SDG 4 also calls for building and upgrading education facilities that are child-, disability-, and gender-sensitive and for providing safe, non-violent, inclusive and effective learning environments for all.

To achieve this ambitious goal, countries should ensure inclusion and equity in and through education systems and programs. This includes taking steps to prevent and address all forms of exclusion and marginalization, disparity, vulnerability and inequality in educational access, participation, and completion as well as in learning processes and outcomes. It also requires understanding learners' diversities as opportunities in order to enhance and democratize learning for all students.

UNESCO supports government education policy-makers, practitioners and key stakeholders in their efforts to develop and implement inclusive policies, programmes and practices that meet the needs of all learners.

We are confident that this Guide for Ensuring Inclusion and Equity in Education will serve as a resource for countries and will contribute to accelerating efforts worldwide towards inclusive education.



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Glossary

Diversity	People's differences which may relate to their race, ethnicity, gender, sexual orientation, language, culture, religion, mental and physical ability, class, and immigration status.
Equity	Ensuring that there is a concern with fairness, such that the education of all learners is seen as being of equal importance.
Gender equality	The understanding that women and men have equal conditions for realizing their full human rights and for contributing to, and benefiting from, economic, social, cultural and political development.
Inclusion	A process that helps to overcome barriers limiting the presence, participation and achievement of learners.
Inclusive education	Process of strengthening the capacity of the education system to reach out to all learners.
Individual education plan	Written plan/programme with input from the parents that specifies the student's academic goals and the method to obtain these goals.
Integration	Learners labelled as having 'special educational needs' are placed in mainstream education settings with some adaptations and resources, but on condition that they can fit in with pre-existing structures, attitudes and an unaltered environment.
Mainstreaming/Mainstream education	The practice of educating students with learning challenges in regular classes during specific time-periods based on their skills.
Special education	Classes or instruction designed for students categorized as having special educational needs.
Special educational needs	A term used in some countries to refer to children with impairments that are seen as requiring additional support.

Introduction

Introduction

In September 2015, countries committed to a renewed framework for sustainable development by adopting the 2030 Agenda for Sustainable Development and the Sustainable Development Goals (SDGs). This Agenda recognizes the actions that individuals, communities and governments need to take to secure the well-being of both people and the planet, by promoting social and human development, environmental protection, economic prosperity, and equity. Inclusive quality education is both a goal in itself (Sustainable Development Goal 4) and a means for attaining all other SDGs.

Why was this guide developed?

As countries seek to strengthen their national educational systems, finding ways of including *all learners* and ensuring that each individual has an equal opportunity for educational progress remain major challenges.

This guide is intended to support countries in embedding inclusion and equity in educational policy. The ultimate objective is to create system-wide change for overcoming barriers to quality educational access, participation, learning processes and outcomes, and to ensure that all learners are valued and engaged equally.

For whom is the guide intended?

The guide is intended for use by key government education policy-makers, working with key stakeholders such as teachers and other educators, students, families, and community representatives. The guide could also assist development partners in facilitating a policy review process. However, governments would need to be at the helm of such a process for system-wide and sustainable change.

What does the guide include?

The guide is built around an assessment framework that can serve to:

- Review how well equity and inclusion currently figure in existing policies;
- Decide which actions are needed to improve policies and their implementation towards equitable and inclusive education systems; and
- Monitor progress as actions are taken.

The guide includes evidence that informs the assessment framework, examples of initiatives that are contributing to more inclusive and equitable education systems in different parts of the world, and recommendations for further reading.

How was the guide developed?

The guide draws on international research and on best practice related to equity and inclusion in education systems. It was developed with the advice and support of a group of international experts, including policy-makers, practitioners, researchers, teacher educators, curriculum developers and representatives of various international agencies. It is built upon the UNESCO International Bureau of Education (IBE) series of Training Tools for Curriculum Development, 'Reaching Out to All Learners: A Resource Pack for Supporting Inclusive Education', and on updates to the 2009 UNESCO Policy Guidelines on Inclusion in Education.

Where can the guide be used?

This guide is relevant to all countries and educational systems. While targeting improvements in formal education, it recognizes that education occurs in many contexts – in formal, non-formal and informal settings – and across one's lifetime. The guide can either be used independently or it can be incorporated into other policy review processes and tools to ensure attention to equity and inclusion.

1.

Inclusion and equity in education

Inclusion and equity in education

Inclusion and equity in development agendas

The right of all children to education is asserted in numerous international treaties and texts, and has been affirmed by both legally binding and non-binding instruments.¹ States therefore have an obligation to respect, protect and fulfil the right of *all learners* to education (UNESCO, 2014).

The last 15 years have seen significant progress globally in expanding access to education, particularly at the primary level. Nevertheless, UNESCO's most recent figures indicate that some 263 million children and youth aged between 6 and 17 years, most of them girls, are not in school today (Global Education Monitoring Report, 2016). Projections indicate that 25 million of these children will never set foot in a classroom. Significant gender disparities exist, with girls representing two-thirds of the total number of children out of school.

Compared with the richest children, the poorest children are four times more likely to be out of school and five times more likely not to complete primary education (Global Education Monitoring Report, 2016). While the situation is most acute in the developing world, growing inequalities are also present in many wealthier countries, compounded mainly by increasing globalization and international migration.

The Sustainable Development Goals build on the Millennium Development Goals (MDGs) and the goals of

Education for All (EFA) – the global movement to ensure quality basic education for all children, youth and adults – and are specific about the kind of education that is needed in today's world. SDG 4 calls for countries to 'ensure inclusive and equitable quality education, and promote lifelong learning opportunities for all'.

The Education 2030 Framework for Action has been adopted by the global education community to advance progress towards SDG4 and its targets. The Framework stresses the need to address all forms of exclusion and marginalization. It specifically calls for addressing inequalities related to access, participation, and learning processes and outcomes, paying particular attention to gender equality. This includes efforts to enable education systems to serve all learners, with a particular focus on those who have traditionally been excluded from educational opportunities. Excluded learners include those from the poorest households, ethnic and linguistic minorities, indigenous people, and persons with special needs and disabilities.

Inclusion and equity in educational policy

The central message is simple: **every learner matters and matters equally**. The complexity arises, however, when we try to put this message into practice. Implementing this message will likely require changes in thinking and practice at every level of an education system, from classroom teachers and others who provide educational experiences directly, to those responsible for national policy.

Education policy can influence and support inclusive thinking and practices by establishing the equal right of every individual to education, and by outlining the forms of teaching, support and leadership that lay the foundation for quality education for all (UNESCO, 2015b).

1. This includes, for example, Article 26 of the Universal Declaration of Human Rights (1948), the Convention relating to the Status of Refugees (1951), the International Covenant on Economic, Social and Cultural Rights (1960), the Convention against Discrimination in Education (1960), the Convention on the Elimination of All Forms of Discrimination against Women (1979), the Convention on the Rights of the Child (1989), the UN Convention on the Rights of Persons with Disabilities (2006), and the UN General Assembly Resolution on the Right to Education in Emergency Situations. See: UNESCO. 2015. Education 2030 Incheon Declaration and Framework for Action. Paris, UNESCO.

Box 1. Key terms

Inclusion is a process that helps overcome barriers limiting the presence, participation and achievement of learners.

Equity is about ensuring that there is a concern with fairness, such that the education of all learners is seen as having equal importance.

Developing policies that are inclusive and equitable requires the recognition that students' difficulties arise from aspects of the education system itself, including: the ways in which education systems are organized currently, the forms of teaching that are provided, the learning environment, and the ways in which students' progress is supported and evaluated.

Even more important is translating this recognition into concrete reforms, **seeing individual differences not as problems to be fixed, but as opportunities for democratizing and enriching learning**. Differences can act as a catalyst for innovation that can benefit all learners, whatever their personal characteristics and home circumstances.

Integrating the principles of equity and inclusion into education policy involves:

- Valuing the presence, participation and achievement of all learners, regardless of their contexts and personal characteristics.
- Recognizing the benefits of student diversity, and how to live with, and learn from, difference.
- Collecting, collating and evaluating evidence on children's barriers to education access, to participation and to achievement, with particular attention to learners who may be most at risk of underachievement, marginalization or exclusion.
- Building a common understanding that more inclusive and equitable education systems have the potential to promote gender equality, reduce inequalities, develop teacher and system capabilities, and encourage supportive learning environments. These various efforts will, in turn, contribute to overall improvements in educational quality.
- Engaging key education and community stakeholders to foster the conditions for inclusive learning, and to foster a broader understanding of the principles of inclusion and equity.

- Implementing changes effectively and monitoring them for impact, recognizing that building inclusion and equity in education is an on-going process, rather than a one-time effort.

Bringing the principles of equity and inclusion into education policy also requires engaging other sectors, such as health, social welfare and child protection services, to ensure a common administrative and legislative framework for inclusive and equitable education.

Box 2. Inclusive education for children with disabilities

Children with disabilities are among the most marginalized and excluded groups of children; routinely, they are denied their right to quality education (WHO and World Bank, 2011). Policies vary considerably worldwide, with some countries prioritizing education for these children in different settings: special schools and centres; special classes in integrated schools; or inclusive schools which work to identify and remove barriers, and to enable every learner to participate and achieve in mainstream settings. Establishing inclusive schools is widely regarded as desirable for equality and human rights, and it has educational, social and economic benefits (UNESCO, 2001).

Many factors can work either to facilitate or to inhibit inclusive and equitable practices within education systems. Some of those factors are: teacher skills and attitudes, infrastructure, pedagogical strategies and the curriculum. These are all variables which education ministries either control directly, or over which they can at least exert considerable influence.

The framework presented in the next section explores the key dimensions and features of education policy. If supported by the necessary legislation, institutions and resources, this framework can be transformative in creating inclusive and equitable education systems.

"The central message is simple: every learner matters and matters equally."

2.

Inclusion and equity

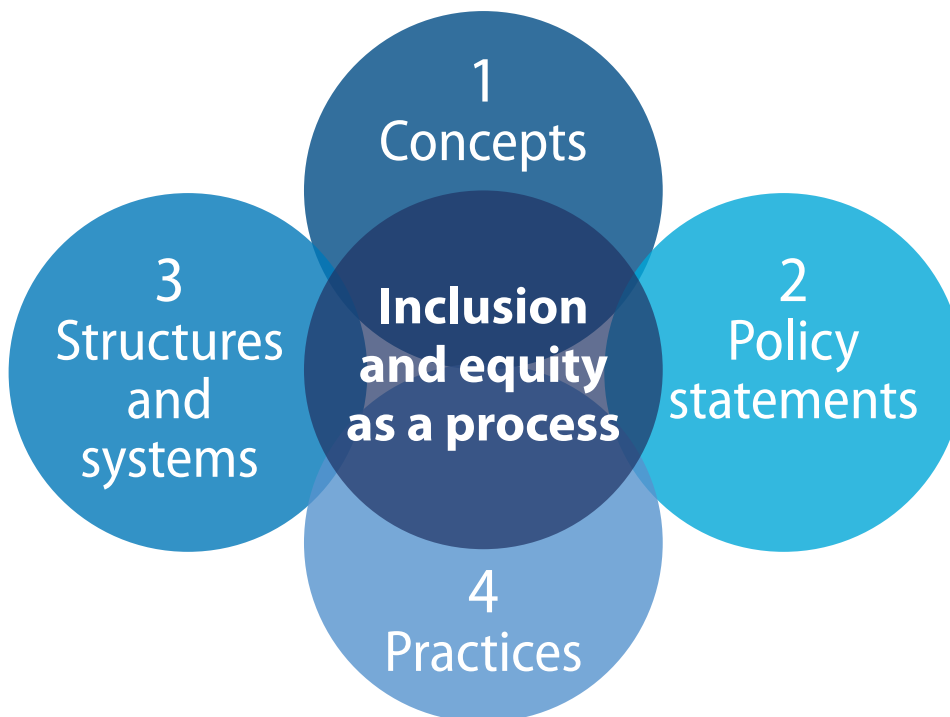
policy analysis

2. Inclusion and equity policy analysis

Whether at the national or more local level, countries can use the policy review framework presented in this Guide in three ways: to assess existing education policies for their attention to equity and inclusion; to create and implement an action plan to advance education policy; and, to monitor progress as actions are taken. This policy review framework is based on a framework originally developed for the 48th session of the International Conference on Education and it relates to 'Reaching Out to All Learners: A Resource Pack for Supporting Inclusive Education'.

International research has identified four overlapping dimensions as keys to establishing inclusive and equitable education systems (Figure 1). This section explains these dimensions at length, providing examples of initiatives in different parts of the world that are contributing to more inclusive and equitable education systems.

Figure 1. Dimensions of the policy review framework



Source: Adapted from UNESCO-IBE, 2016

Each dimension has four defining features. These features form the basis of the self-assessment framework.

Dimension 1 | Concepts

Key features

1.1

Inclusion and equity are overarching principles that guide all educational policies, plans and practices

1.2

The national curriculum and its associated assessment systems are designed to respond effectively to all learners

1.3

All partners who work with learners and their families understand and support the national policy goals for promoting inclusion and equity in education

1.4

Systems are in place to monitor the presence, participation and achievement of all learners within the education system

1.1 Inclusion and equity are overarching principles that guide all educational policies, plans and practices

Inclusion and equity are overarching principles that should guide *all* educational policies, plans and practices, rather than being the focus of a separate policy. These principles recognize that education is a human right and is the foundation for more equitable, inclusive and cohesive communities (Vitello and Mithaug, 1998).

Ensuring that all learners have access to quality education also acknowledges the intrinsic value of diversity and respect for human dignity (UNESCO, 2015a). In this way, differences come to be seen in a positive light as the stimulus for fostering learning among children, young people and adults, and for promoting gender equality. The principles of inclusion and equity are, then, not only about ensuring access to education, but also about having quality learning spaces and pedagogies that enable students to thrive, to understand their realities, and to work for a more just society.



Box 3. Infusing inclusive principles and practice in education in Lao PDR

In the Lao People’s Democratic Republic, **the education system is seeking to apply the principle of inclusion through shifts in policy and in the culture.** Education in Lao PDR has significant disparities between boys and girls, rural and urban areas, poor and non-poor districts, and among ethnic groups on rates of enrolment, repetition, dropping out, and completion. To address this, the **national policy focuses on inclusive education, broadly defined as removing all barriers to school enrolment and achievement.** Leadership and a strong, common understanding of inclusion are the key factors in reaching the policy’s goals. Additional factors that are key to success include capacity-building, awareness-raising, and inclusion of women and girls, ethnic people, and persons with disabilities in decision-making processes and other efforts for reaching excluded learners. Such efforts include strengthening the capacity of schools and of the Village Education Development Committee to perform these tasks:

- Collect and analyse data, including from local family registries, for tracking children who are not in school;
- Conduct child-seeking activities to support out-of-school learners in re-entering the education system;
- Conduct regular monitoring of student attendance to identify those at risk of dropping out;
- Use statistics to establish long-term school development plans and yearly school improvement actions and targets for promoting retention; and
- Create rights-based child-friendly schools, as defined by UNICEF, which are part of a wider framework of child-friendly families, communities and provinces, encompassing the country as a whole (Shaeffer, 2013; 2015).

To find out more:
https://www.unicef.org/cfs/files/Identifying_and_Promoting_Good_Practice_in_Equity_and_Child-Friendly_Education.pdf

1.2 The national curriculum and its associated assessment systems are designed to respond effectively to all learners

The curriculum is the central means for enacting the principles of inclusion and equity within an education system. Developing a curriculum that will include all learners may well involve broadening the definition of learning used by teachers and education decision-makers. As long as learning is defined narrowly as the acquisition of knowledge presented by a teacher, schools will likely be locked into rigidly organized curricula and teaching practices. In stark contrast, **inclusive curricula are based on the view that learning occurs when students are actively involved, taking the lead in making sense of their experiences** (Udvari-Solnar, 1996).

In this changed view, the teacher's role becomes one of guiding and facilitating engagement and learning, rather than instructing. This makes it possible for a diverse group of students to be educated together, since the students need not to be at the same point in their learning, or receive the same instruction from their teacher. Rather, they can work at their own pace and in their own way, within a common framework of objectives and activities. This approach also fosters a sense of belonging to a community and a shared understanding of key values and global citizenship – a sense of being a part of a broader community and common humanity (UNESCO, 2015d).

At its heart are the planned teaching and learning opportunities that are available in ordinary classrooms – the intended curricula effectively implemented. It is also essential to develop and use national assessment systems that comply with international human rights norms, so that education will fulfil the objectives that human rights conventions established (see Dimension 4.3 below).²

It is important to remember, at the same time, that students have access to many other learning experiences; while these experiences may be more difficult to plan, they are certainly influenced by the schools and other aspects of the education system. These experiences include social interactions among students, interactions between students and teachers both in and out of the classroom, and learning experiences that occur within the community, for instance, in the family or in various social or religious contexts.

Box 4. Fitting the curriculum to student needs in the Netherlands

In the Netherlands, education policy promotes integrating pupils with special education needs into mainstream education. While core curriculum objectives must be covered in all schools and inspectorates monitor how the content specified in these objectives is implemented, **schools have significant freedom to organize the curriculum so that it responds to the needs and capacities of their learners**. Scenarios have been created to guide schools in organizing the different learning areas within their curriculum. While developing these tailor-made curricula puts additional demands on schools and teachers, it is also part of **ensuring the quality of education for students with special educational needs, wherever that education takes place**. As the authors mention, in the Netherlands, 'education is seen as an important tool to combat poverty, social exclusion and marginalization' (Thijs et al., 2008, p. 39).

To find out more: https://www.european-agency.org/sites/default/files/Inclusive_Education_Netherlands.pdf

"... learning occurs when students are actively involved..."

2. See Human Rights Council. 2014. Report of the Special Rapporteur on the Right to Education, A/HRC/26/27.

1.3 All partners who work with learners and their families understand and support the national policy goals for promoting inclusion and equity in education

Educational change is technically simple but politically and socially complex (Fullan, 2007). Moves towards inclusion and equity may not always be understood or welcomed in contexts where people are used to segregated education provision, or where educators doubt their ability to cope with learners' diversity. Therefore, it is necessary to mobilize opinion in favour of these principles of equity and inclusion.

Box 5. Building commitment to inclusion and equity in Bangladesh

What is happening in Shirina Akter's classroom is a positive example of the impact of inclusive thinking. 'Facing her class of 60 children, she moves on to the last exercise before school breaks up for a short holiday: comprehension. While rows of girls with neat plaits and boys in short-sleeved shirts scribble away in their exercise books, one child sitting at the front delivers a series of pin-pricks into a black, plastic tablet. Salim, who has been blind since birth, is using a simple device to write in Braille. It is just one of the things that allows him to sit alongside his peers at the Hasnabad primary school, in a small, thriving country town of textile mills, soap factories and farms, about 50 km northeast of Dhaka' (UNICEF, 2014, p. 10). In places like Hasnabad, Sightsavers has been working with local partners, such as the non-profit organization Assistance for Blind Children (ABC), **to build the commitment and capacity among teachers and schools to include the visually impaired** in mainstream schools. ABC also engages with the children's parents, many of whom assume that their child's impairment means that he or she is incapable of learning and will be barred from school. Such engagement raises parents' awareness and provides an opportunity for determining the appropriate school placement for the child.

To find out more:

http://www.inclusive-education.org/sites/default/files/uploads/booklets/IE_Webinar_Booklet_13.pdf

http://www.eenet.org.uk/resources/docs/Sightsavers_Bangladesh_booklet.pdf

Some key lessons have emerged from efforts to build consensus for equity and inclusion in education. These lessons include the need for:

- **Clarity of purpose**, and a shared understanding of the rationale for and the purpose of the changes that are being introduced;
- **An understanding of the added value** of the proposed changes, emphasizing the benefits for parents and children, for the community at large, and for the education system itself;
- **Evidence to enable** informed judgements about the current situation and the impact expected from the proposed changes;
- **Champions**, those who are committed to inclusive and equitable education, and who can mobilize networks of support; and
- **Strategic communication**, which may require the development of a strategy that draws on different channels to reach different stakeholders.



1.4 Systems are in place to monitor the presence, participation and achievement of all learners within the education system

Research points to 'levers for change' that can be used to promote equity and inclusion in education. In particular, research identifies important **evidence that the presence, participation and achievement of learners are among the most important factors for success** (Ainscow, 2005).

Deciding what kinds of evidence to collect and how to use it requires care. For example, education systems now collect far more statistical data on learning outcomes than ever before (often using standardized tests for country comparisons), in order to determine the effectiveness of those systems. This reflects a narrow view of education as merely the acquisition of a set of functional skills. This view has, in turn, led to new pressures: in many countries, the officials who guide the nation's policies have become preoccupied with measuring school outcomes through test scores, and with comparing their progress to the progress of other countries.

In countries with narrowly conceived criteria for defining success, monitoring mechanisms can impede the development of a more inclusive education system. A well-functioning education system requires policies that focus on the participation and achievement of all learners. It must also address the disadvantages faced by some groups in the population, such as those from the poorest households, ethnic and linguistic minorities, indigenous people, persons with special needs and disabilities, and girls (World Bank Group, 2011).

Therefore, accepted, clearly stated definitions of inclusion and equity should be the starting point for deciding what to monitor. In other words, there is a need to 'measure what we value', rather than 'value what we can measure' (Ainscow et al., 2003), which is often what happens.

The SDGs call for a greater focus on equity point to renewed efforts for measuring inequality in education. Many countries have standards for assessing children's educational attainment, at all levels of schooling. In some countries, detailed statistics at the level of the school, or even the class, are available on students having difficulty in school or suffering from other disadvantages. In many cases though, household surveys or other methods are needed in order to identify those who are the furthest behind.

Box 6. Assessing the inclusiveness of mainstream schools in Ghana

Ensuring free, compulsory and good-quality basic education for all children is the commitment undertaken by the Government of Ghana. The key question is this: **How can the government check that these efforts are helping more children gain access to school and participate in learning and social life in school?** To answer this question, the Inclusive Education Monitoring Tool was developed to make a more systematic monitoring possible. Head teachers use this checklist to gather qualitative and quantitative information, with contributions from teachers during school meetings; supervisors, who already visit and support the schools regularly, then counter-check the checklist. Supervisors visit school facilities, observe classrooms, interview the teachers and children informally, and provide feedback to school heads and teachers. The monitoring happens twice a year to measure growth and to determine the path for decision-making for the next academic year. It also provides baseline information for on-going assessment of school inclusiveness in the country. **At the school level, these data help head teachers to identify barriers to inclusion in their schools, and to encourage a flexible approach to inclusive practices.** They also help in identifying positive attitudes and active stakeholders in the schools and the community, allowing schools to build on their existing strengths (Otaah et al., 2013).

Dimension 2 | Policy statements

Key features

2.1

The important national education policy documents strongly emphasize inclusion and equity

2.2

Senior staff at the national, district and school levels provide leadership on inclusion and equity in education

2.3

Leaders at all levels articulate consistent policy goals to develop inclusive and equitable educational practices

2.4

Leaders at all levels challenge non-inclusive, discriminatory and inequitable educational practices

2.1 The important national educational policy documents strongly emphasize inclusion and equity

Legislation is a vital part of developing a more inclusive and equitable education system. In particular, legislation provides the articulation of principles and rights that is needed for creating a framework for inclusion, and for reforming those elements in the existing system that may constitute major barriers to equity. (Such barriers include policies which forbid students from specific groups – such as learners with disabilities, or from different language groups – from attending their neighbourhood school.) Furthermore, legislation articulates the mandate of fundamental inclusive practice (for instance, that schools should educate all learners in their communities). It also articulates the procedures and practices throughout the education system that will facilitate equity (for example, by creating a flexible curriculum, or by introducing community governance).

Even where radical legislative reform is neither desirable nor possible, **statements of principles at the government level can generate debate around inclusion and equity in education and begin the process of consensus building.**

In some countries, special education systems are covered by separate legislation and administered by separate sections or departments at national and local levels. Special education may also have separate systems for training and funding, and its own curricula and assessment procedures. In these situations, it may be necessary to integrate the legislative frameworks that govern the welfare, social and health sectors with general and special education. This is not just about locating the special education system under the umbrella of general education legislation, but about merging the two systems.

Box 7. A national policy for multiculturalism in Paraguay

Paraguay is a multi-ethnic, multicultural society. The 1967 constitution recognized Paraguay as a bilingual country, and bilingual teaching and learning have been national policy since 1994. Language plays a very important role, both for understanding the national culture and for transmitting cultural values that are universally accepted. Bilingual education is a pedagogical approach in which the mother language is deemed necessary throughout the whole learning process. The second language is introduced with respect to the mother language in order to achieve communicative competence in both. 'In curriculum planning, the 'mother tongue' has been defined as the language that students across the educational system use preferentially. The 'second language' is the language in which the child has less communicative proficiency' (Benítez Ojeda and Martínez Stark, 2014, p. 122, original in Spanish). **One innovative literacy model that has been successfully implemented uses both official languages at the same time. In this perspective, education in two languages and in two cultures is the foundation that ensures functional and meaningful learning.** This avoids a long, complicated process of trying to prioritize one language over the other.

Additionally, it is important to ensure effective communication among various stakeholders in countries where various laws and sectors regulate certain population groups. When communication is effective, it is possible to build a legislative framework that will unite available resources around the single purpose of creating a more inclusive and equitable system of education.

However, international declarations on educational inclusion and equity have to be interpreted in light of local circumstances. Many countries have found it useful to formulate an explicit statement of the principles that guide their own transition towards greater inclusion and equity. States that do this fulfil their obligations by making positive efforts to enable individuals and communities to enjoy their right to education (UNESCO, 2014).

2.2 Senior staff at the national, district and school levels provide leadership on inclusion and equity in education

Policy is made at all levels of an education system, not least at the level of the classroom. As such, **the transition to inclusion and equity is not simply a technical or an organizational change. Rather, it is a move in a clearly philosophical direction** (Fulcher, 1989).

Moving to more inclusive and equitable ways of working requires changes in the culture throughout an education system (Dyson et al., 2004). These changes range from shifts in policy-makers' values and ways of thinking, which then enable them to provide a new vision for shaping a culture of inclusion and equity, to significant changes within schools.

A culture of inclusion and equity in education requires a shared set of assumptions and beliefs among senior staff at the national, district and school levels. Central to these assumptions and beliefs is valuing differences, believing in collaboration, and being committed to offering educational opportunities to all students (Dyson et al., 2004).

"A culture of inclusion and equity in education required a shared set of assumptions and beliefs among senior staff. . ."

Altering the cultural norms that exist in an education system is difficult; it is particularly difficult in a context that faces so many competing pressures and where practitioners tend to work alone when addressing problems. Leaders at all levels, including those in civil society and in other sectors, **have to be prepared to analyze their own situations, identify local barriers and facilitators, plan an appropriate development process, and provide leadership** for inclusive practices and effective strategies for monitoring equity in education.

Box 8. Building leadership through inclusive education planning in Rwanda

Since 2012, Rwanda has prepared annual inclusive education development action plans at the district level, in cooperation with the NGO Handicap International. These plans are intended to enable district and sector officials, school practitioners, parents, educational officials, children and other actors to own inclusive education and to be engaged in putting it into practice. By using a participatory approach, they analyse local needs, plan activities, identify stakeholders to be involved, set goals and indicators, strategies to be used, and target dates for review and evaluation. Collaborations with the District Education Departments provide insight into needed actions to support the implementation of the plans based on available resources. **In a relatively short time, the behaviour of school head teachers, as well as district, sector and education officials, has changed significantly towards owning and understanding the principle of inclusion in education** (Murenzi and Purnomo, 2013).

2.3 Leaders at all levels articulate consistent policy goals to develop inclusive and equitable educational practices

Developing inclusive and equitable educational practices is not only about promoting new techniques. More importantly, it is about **providing the space to review and unpack the social processes of learning that occur in specific school contexts, and the actions and the thinking that inform these processes** (Ainscow et al., 2006).

Leaders at all levels of the education system have an important role in promoting inclusive ways of managing schools and the education process. Much of what teachers do during the intensive encounters that occur in a typical lesson happens at an automatic, intuitive level, involving tacit knowledge. Furthermore, teachers often have little time to stop, think, and engage in a dialogue with other teachers about their teaching practice.

Education systems can create opportunities for teachers and educators to build a common language about detailed aspects of their practice, and about how to make these aspects of practice more inclusive and equitable (Huberman, 1993). Without such a language, teachers may find it difficult to experiment with new possibilities. It is through their shared experiences that colleagues can help each other to articulate what they currently do and to define what they might like to do. Their common language and shared experiences are also the means for challenging assumptions and biases about particular groups of learners.

Techniques that are particularly powerful for sharing experiences use mutual observation, sometimes through video recordings, and evidence collected from students about teaching and learning arrangements within a school. Such approaches can help stimulate self-questioning, creativity, and actions to address barriers to participation and learning (Ainscow et al., 2003; Hiebert et al., 2002).



UN Photo / Martine Perret

2.4 Leaders at all levels challenge non-inclusive, discriminatory and inequitable educational practices

Leaders at all levels need to establish the conditions within their organizations for challenging non-inclusive, discriminatory and inequitable educational practices. From the complementary perspective, leaders need to establish the conditions that build consensus and commitment towards putting the universal values of inclusion and equity into practice.

Particular forms of leadership are known to be effective in promoting school equality, equity and social justice. These approaches focus attention on teaching and learning; they create strong communities of students, teachers and parents; they nurture the understanding of a culture of education among families; and, they foster multi-agency (Kugelmass and Ainscow, 2005). Unlike mechanistic views of educational improvement, these approaches acknowledge that decisions about how to improve schools always involve moral and political reasoning, as well as technical considerations. Therefore, having discussions about inclusion and equity can help in articulating the values that underlie *which, how* and *why* changes should be made in schools.

Education systems can promote this kind of supportive school leadership by:

- Selecting and training school leaders based on their commitment to inclusive and equitable values, and their capacity to promote the style of management described above;
- Providing teachers with opportunities to pool their professional experience and expertise so as to re-examine their practice, with the goal of making that practice more responsive and flexible to learners (see 2.3 above); and,
- Developing 'inclusive cultures' and consensus around inclusive and equitable values within school communities (Deppeler and Ainscow, 2016).

Box 9. Educational roundtables in Nicaragua engage civil society in policy advocacy

The *Foro de Educación y Desarrollo Humano de la Iniciativa por Nicaragua* (the Forum for Education and Human Development of the Initiative for Nicaragua) promotes the participation of civil society in 'formulating, implementing and evaluating national education policies and programmes' (Campaña Latinoamericana por el Derecho a la Educación, 2012, p. 14). This has led to creating local education 'roundtables', which are cooperative, decision-making spaces for education discussions at the municipal level. All interested stakeholders are welcome to participate, including educators, NGOs, institutions and representatives from the Ministry of Education and local governments. Each roundtable determines its own organization and leadership, taking the context of each community into account. The project coordinator explains: '**Education roundtables provide an opportunity to discuss education policy advocacy. At the time, we felt it was important to influence national decisions, but it was also important to advocate in the communities in which we believe more tangible changes to education can be made.** It was also important to work with the roundtables as a strategy to decentralize the issue of education and for local authorities to make a greater commitment to education in their municipalities' (Campaña Latinoamericana por el Derecho a la Educación, 2012, p. 15).

To find out more: http://www.campaignforeducation.org/docs/csef/CLADE%20Lessons%20Learned%20-%20Casos%20EPDF%20Final_INGLES_baixa.pdf



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Dimension 3 | Structures and systems

Key features

3.1

There is high-quality support for vulnerable learners

3.2

All services and institutions involved with learners and their families work together in coordinating inclusive and equitable educational policies and practices

3.3

Resources, both human and financial, are distributed in ways that benefit potentially vulnerable learners

3.4

There is a clear role for special provision, such as special schools and units, in promoting inclusion and equity in education

3.1 There is high-quality support for vulnerable learners

In order to foster inclusion and equity in education, governments need to mobilize human and financial resources, some of which may not be under their direct control. **Forming partnerships among key stakeholders who can support and own the process of change is essential.** These stakeholders include: parents/caregivers; teachers and other education professionals; teacher trainers and researchers; national, local and school-level administrators and managers; policy-makers and service providers in other sectors (e.g. health, child protection and social services); civic groups in the community; and members of minority groups that are at risk of exclusion.

Families' involvement is particularly crucial. In some countries, parents and education authorities already cooperate closely in developing community-based programmes for certain groups of learners, such as those who are excluded because of their gender, social status or impairments (Mittler, 2000). A logical next step is for these parents to become involved in supporting change for developing inclusion in schools.

"Forming partnerships among key stakeholders who can support and own the process of change is essential."

Where parents lack the confidence and skills to participate in such projects, it might be necessary to work with them to help them develop their capacity and build networks. This could include creating parent support groups, training parents to work with their children, or building parents' advocacy skills for negotiating with schools and authorities (Miles, 2002).

Box 10. Listening to children: experiences in Denmark

The 'Children's Voice' project in Copenhagen's inner-city schools consults with parents and children to elicit their views on the child's well-being and learning. It builds on the 'Joint Action' inclusive programme that aims to create more family-oriented actions in childhood education, with everyone contributing as equal stakeholders. The consultations are organized by professionals who create a framework for reflection in a 'blame-free' atmosphere, where everybody is entitled to offer solutions to concerns that have been shared. This means that the meetings must be well-prepared, well-facilitated and solution-focused. The consultations result in an action plan that the participants develop, implement and evaluate jointly. **'Children's Voice' seeks to develop a unifying sense of community, grounded in individual realities, that aims particularly at building relationships** (Lentz, 2015).

3.2 All services and institutions involved with learners and their families work together in coordinating inclusive and equitable educational policies and practices

In some countries, a move towards a decentralized management structure has accompanied the shift to more inclusive and equitable education. Decentralization seems to encourage flexibility and risk-taking, and it also counteracts the tendency of centralized bureaucracies to set up rigid decision-making procedures. Clearly, there are risks to avoid, not least regarding the control of financial resources. Decentralized control therefore entails a need for checks and balances to ensure fairness in allocating and using resources.

There is also evidence that **school-to-school collaboration can strengthen the capacity of individual organizations to respond to diversity among learners** (Muijs et al., 2011). Specifically, collaboration between schools can help reduce the polarization of schools, to the particular benefit of those students who are marginalized at the edges of the system. In addition, there is evidence that, when schools develop more collaborative ways of working, there is an impact on how teachers perceive themselves and their work. More specifically, discussing and comparing their practice can lead teachers to view underachieving students in a new light. As a result, learners who are difficult to educate within

the school's established routines are seen, not as 'having problems', but as challenging teachers to re-examine their own practice in order to make it more responsive and flexible.

Box 11. Cluster schools in Ethiopia

In Ethiopia, the NGO Handicap International piloted an approach in which six 'cluster schools' became **inclusive by accommodating learners with special educational needs, including children with disabilities**. The cluster schools, which enrolled over 700 students, were used to support 30 satellite schools in applying similar educational practices and approaches. Representatives from organizations for persons with disabilities were involved in promoting and practicing inclusive education for vulnerable groups together with the cluster schools; children supported this educational process through student parliaments and clubs. **This led to improvements in inclusive education practice by service-providers, better physical accessibility for learners, increased enrolment for children with disabilities and a better learning environment for all students** (Murenzi and Mebratu, 2013).



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3.3 Resources, both human and financial, are distributed in ways that benefit potentially vulnerable learners

While all countries face difficulties in finding the funds to support inclusive and equitable developments, this is particularly challenging in the parts of the world that are economically poorer. Therefore, it is important to find ways of addressing the needs of the most marginalized and of student diversity that do not necessarily demand extra funding and additional resources. **The crucial factor is ensuring that available resources, particularly human resources, are used to best effect.** Countries should make sure that the criteria for allocating financial and human resources for education reflect the goals of inclusion and equity.

The long-term social and economic benefits of targeting public resources towards the marginalized far outweigh the costs. Some countries that have targeted spending towards disadvantaged groups have seen results in more equitable learning outcomes (UNESCO, 2015c).

"...It is important to find ways of addressing the needs of the most marginalized and of student diversity that do not necessarily demand extra funding and additional resources."

It may be necessary to set up or strengthen monitoring systems to ensure that funding and other resources are used appropriately and effectively. Even though levels of funding differ from country to country, many of the challenges and the strategies are similar. Establishing sustainable partnerships between the government and other potential funders is also worthwhile.

Box 12. A regional framework for prevention, care and support activities in Africa

The Southern African Development Community (SADC) is home to more than 17 million orphans; many more girls, and children and youth with disabilities remain vulnerable in countries across the region. These numbers represent one of the most profound and long-lasting impacts of the HIV epidemic. Care and Support for Teaching and Learning (CSTL), a partnership among countries, provides an overarching framework for initiating, coordinating and expanding prevention, care and support activities; such activities aim, in all instances, at improving education outcomes. A developmental approach – addressing barriers to education through care and support for teaching and learning – has been at the heart of CSTL since its inception, and continues to underpin its planning and execution. At the school level, CSTL supports identifying, assessing, and providing materials required for basic survival needs, as well as the monitoring of vulnerable students. Beyond that, it also provides access to HIV education and services for vulnerable children and youth, especially girls, who are at a higher risk of exposure. At the national and subnational levels, CSTL is 'mainstreaming care and support in appropriate ways across all components of the education system, such as governance and management, policy, planning and resourcing, human resource development, curriculum, infrastructure, structures and partnerships, and monitoring ...' (Care and Support for Teaching and Learning, 2013, p. 15). **Through the allocation of personnel and resources, demonstrable commitment by Ministries of Education has resulted in government ownership and leadership of CSTL at the national level.**

To find out more:
http://www.cstlsadc.com/wp-content/uploads/2016/10/CSTL_Implementation_Framework_2013_to_2018_Final_English.pdf

3.4 There is a clear role for special provision, such as special schools and units, in promoting inclusion and equity in education

Where countries have separate special provisions, it is likely that these will continue contributing, at least for the time being. **Special schools and units can play a vital role by acting as resource centres for supporting regular schools as they seek to become more inclusive.** For this reason, encouraging cooperation between the two sectors is very important, not least so as to minimize social isolation. Such cooperation opens up new and promising opportunities for special school staff to continue their historical task of providing support for the most vulnerable learners in the education system (Ainscow, 2006).

Countries that do not have such schools or units can concentrate their resources on developing local schools in line with the principles of inclusion and equity. As the local schools become more inclusive, the need for separate special services will diminish.

Here, once again, **it is important that governments make a clear commitment to inclusion and equity, emphasizing the benefits for parents and children, and for the community at large.** Specifically, it is useful to distinguish between needs, rights and opportunities. While all learners have needs (e.g. for appropriate teaching), they also have the right to participate fully in a common social institution (that is, a local mainstream school) that offers them a range of opportunities. Too often, parents are forced to choose between ensuring that their child's needs are met (which sometimes implies placement in a special school or unit) and ensuring that they have the same rights and opportunities as other learners (which implies placement in a mainstream school). The goal should be to create an education system where these choices become unnecessary. This system should strive to support local schools and teachers by assisting them in developing their capacities, by providing equipment and materials, and by fostering collaboration across sectors.

Box 13. Developing an itinerant teacher support system in Cambodia

Itinerant teachers have been introduced in Cambodia to promote inclusive education with school directors and teachers; these teachers offer advice, resources and support to children with disabilities, to their teachers and to their parents in different communities. When the system was introduced, **'it quickly became obvious that the itinerant teacher system could not focus only on the children with disabilities, but should also focus on the quality of education to improve the learning environment of all children'** (Bouille, 2013, p. 12). Sopheap, a 16-year-old boy with Down's syndrome, benefitted from this twin-track approach. Sopheap was expelled from school because of behavioural issues: he would fight back when children teased him. **'Awareness-raising sessions with students using comic books, an animation movie and posters promoted messages about tolerance and valuing differences and diversity'** (Bouille, 2013, p. 13). Due to the increased solidarity among his peers, Sopheap was able to return to school. Moreover, the kindness and positivity of his schoolmates enabled Sopheap to immensely improve his life skills and behaviour. Sopheap's teacher also appreciated the training she received in developing classroom norms, since clear norms – defined and adopted with the students' participation – enabled her to concentrate on supporting all students' learning.



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Dimension 4 | Practices

Key features

4.1

Schools and other learning centres have strategies for encouraging the presence, participation and achievement of all learners from their local community

4.2

Schools and other learning centres provide support for learners who are at risk of underachievement, marginalization and exclusion

4.3

Teachers and support staff are prepared to respond to learner diversity during their initial training

4.4

Teachers and support staff have opportunities to take part in continuing professional development regarding inclusive and equitable practices

4.1 Schools and other learning centres have strategies for encouraging the presence, participation and achievement of all learners from their local community

Too often, the kinds of individualized responses that have been the hallmark of special education divert attention from the forms of teaching and school conditions that can actually involve all of the learners in a class. This helps to explain why efforts at **inclusion that depend on practices imported from special education tend to foster new and more subtle forms of segregation, albeit in mainstream settings** (Florian et al., 2016).

For example, many countries have introduced support staff and teaching assistants into classrooms, working alongside class teachers, to give particular support to students categorized as having special needs. When such support is withdrawn, teachers may feel that they cannot handle their responsibilities (Takala et al., 2009). At the same time, the requirement for individualized education plans – mandated by legislation in some countries – has led some school leaders to feel that many more learners will require such responses, thus creating budget problems within some education systems.

The recognition that inclusive schools will not be achieved by transplanting special education thinking and practice into mainstream contexts opens up new possibilities. Many of these relate to the need to move from the individualized planning frame – referred to above – to a perspective that seeks to personalize learning through an engagement with the whole class (Hart et al., 2004).

Research indicates that encouraging student participation is the best use of available resources, particularly human resources, to support learning. In particular, **there is strong evidence of the potential of approaches that encourage cooperation between students for creating classroom conditions that can both maximize participation, while at the same time achieving high standards of learning for all members of a class** (Johnson and Johnson, 1989).

Furthermore, this evidence suggests that such practices can be effective in supporting the involvement of all learners who are facing vulnerable situations; examples include those who are new to a class, learners from different cultural and language backgrounds, and those with disabilities. However, it is important to stress the need for skill in orchestrating

this type of classroom practice. When group approaches are poorly managed, there is usually a considerable waste of time and, possibly, increased disruption.

In this area, the economically poorer countries of the South have much to teach us. In these countries, limited resources have led to recognizing the potential of ‘peer power’ by developing ‘child-to-child’ programmes (Hawes, 1988). This suggests that the learners themselves are an under-used resource that can be mobilized to overcome barriers to participation in lessons and contribute to improved learning opportunities for all class members. The essential resource is already present in any classroom; what is key is the teachers’ ability to mobilize this, often untapped, energy.

Box 14. Overcoming barriers to inclusion in Gaza

Poverty and violence are very common conditions that characterize the growing up experience for children in Gaza. Thus, going to school gives them an opportunity to develop the skills needed for a better future. These challenging environmental and social conditions make it very difficult to provide a comprehensive and inclusive education system for Gaza’s children and young people. With international support, training sessions were organized to prepare a group of Master Trainers considered as a vital resource for ‘supporting inclusive and child-friendly education’ (Surour and Ashour, 2015, p. 15). Following these preparatory sessions, the Master Trainers carried out awareness-raising trainings in selected schools across the Gaza strip. Teachers in each school worked as facilitators, and parents were encouraged to follow their child’s progress. Aligned with the mission of teaching through child-led activities, the teachers allowed students to determine the learning topics; two schools chose nutrition while the remaining two chose to study the environment. Children began by researching their topics and collecting information. After that, they were asked to demonstrate their understanding and express their feelings using their creativity. Some students chose drawings, stories and songs; whereas, others expressed themselves through slogans, advocacy messages, drama and role-play. **Both parents and teachers were extremely positive about their experience with child-led learning, saying that the children surpassed their expectations.**

To find out more:
<http://www.eenet.org.uk/resources/docs/EER%20advocacy.pdf>

4.2 Schools and other learning centres provide support for learners who are at risk of underachievement, marginalization and exclusion

In an effective education system, all students are assessed on an on-going basis in terms of their progress through the curriculum. This allows teachers to respond to a wide range of individual learners. This means that teachers and other professionals must be well informed about their students' characteristics and attainments, while also assessing broader qualities, such as their capacity for cohesion and cooperation.

However, the ability merely to identify each student's level of performance, or to enumerate certain students' particular difficulties is not enough. **Teachers in inclusive systems need to gauge the effectiveness of their teaching for the range of their students and should know what they need to do to enable each student to learn as well as possible.** Therefore, assessment should focus not only on the students' characteristics and attainments, but also on the curriculum and how each student can learn within and beyond it.

"Teachers in inclusive systems need to gauge the effectiveness of their teaching for the range of their students and should know what they need to do to enable each student to learn as well as possible."

The most useful forms of assessment take place in the classroom and in the other contexts where learning occurs (William, 2011). Teachers need to have the skills to conduct assessments themselves; to prepare for this, they need on-going professional development. They also need to find the ways of working with special educators, psychologists, social workers and medical professionals, when they are available; teachers can use the assessments from these specialists for educational purposes. The most important partners of all are the colleagues, the parents and the students themselves, who are positioned to see things from unique points of view and can thus offer differing perspectives on what is needed to help all learners make progress.

Box 15. Co-teaching for inclusion in Finland

The Pirtti school, located in the city of Kuopio in Finland, has established a co-teaching arrangement that promotes **cooperative learning and teamwork in planning, teaching and evaluation**. This practice was used to combine a mainstream class and a special class of third grade students (age 9). For four years, 'the class was taught together and the teachers were jointly responsible for this group. Later, a similar partnership started between classes from the first and third grades, and this group was taught together for six years' (Bruun and Rimpiläinen, n.d.). A review of the practice found that **teachers' motivation increased significantly; the teachers indicated that working together gave them the strength to manage and develop their work.**

For this approach to be effective, teachers require additional time for joint planning and collaboration. But the results showed benefits, not only for the teachers. When surveyed, students and their parents were also very pleased with the impact of the programme.

To find out more:
<http://www.inclusive-education-in-action.org>

4.3 Teachers and support staff are prepared to respond to learner diversity during their initial training

In an inclusive and equitable education system, all teachers need to approach the diversity among learners with a positive attitude and an understanding of inclusive practices. **Teachers can acquire much of the preparation they need regarding such inclusive practices during their initial training and through short, customized, in-service training units.**

Research on teacher education for inclusive education³ has identified four core values that undergird teachers' competence in developing and sustaining inclusive practice:

1. Valuing learner diversity: Students' differences are viewed as a resource and an asset to education;
2. Supporting all learners: Teachers have high expectations for all learners' achievements;
3. Working with others: Collaboration and teamwork are essential approaches for all teachers; and
4. Continuing personal professional development: Teaching is a learning activity and teachers must accept responsibility for their own lifelong learning.

Embedding these values in teacher education programmes can help empower teachers and support them in developing a wider range of responses to learners who experience difficulties in their learning. Being explicit about these values helps to establish the potential of teacher education to be a high-leverage activity in bringing about change.

A few teachers will develop a high level of special education expertise. However, it would be advisable for such teachers to develop skills and experience as mainstream educators first, and specialize later. Moreover, it is also important that their specialization not be defined too narrowly, given the range of learning difficulties that they will encounter. Rather, the specialization should be built on a broad base of expertise about learning and teaching.

3. European Agency for Development in Inclusive and Special Education (n.d.) Teacher Education for Inclusion (TE4I): Key policy messages. https://www.european-agency.org/sites/default/files/teacher-education-for-inclusion-key-policy-messages_te4i-policy-paper-EN.pdf

Box 16. Teacher educators supporting inclusive education in Viet Nam

Having made a policy commitment to inclusive education, **the Ministry of Education and Training in Viet Nam worked with Catholic Relief Services to develop a national curriculum that would give all student teachers in universities and colleges the quality training that would prepare them for teaching in inclusive settings.** However, the plan was delayed by a lack of suitably experienced teacher educators. The current teacher educators therefore received additional training to boost their attitudes, their knowledge and their practical skills so that they could deliver the training curriculum using appropriate pedagogy. In one initiative, 47 teacher educators, from eight cities/provinces, received 40 hours of training that introduced them to the curriculum they would need to follow. This experience also gave them significant opportunity for personal reflection, for debate, and for practicing the pedagogical skills needed for teaching an inclusive curriculum. **These teacher educators went on to become resource experts to support colleagues in their own and in other teacher education institutions** (Forlin and Nguyet, n. d.).

To find out more:
<http://www.inclusive-education-in-action.org/>



4.4 Teachers and support staff have opportunities to take part in continuing professional development regarding inclusive and equitable practices

In all countries, teachers are the most costly and, potentially, the most powerful resource in the education system. Therefore, **developing the teaching force is crucial, especially in countries where material resources are relatively scarce.**

As systems become more inclusive, professional development is particularly important because of the major new challenges that face regular school teachers, who have to respond to a greater diversity of student needs. Special educators, who find the context and focus of their work changing in major ways, need on-going professional development too. International research (Messiou and Ainscow, 2015) suggests that teacher development should:

- **Take place primarily in classrooms**, where practice develops;
- **Connect to and build on the expertise available within the school**, making connections with existing knowledge;
- **Create cooperative spaces** where teachers can plan together, share ideas and resources, and have opportunities to observe one another working; and
- **Engage teachers in developing a common language of practice** that assists individuals in reflecting on their own ways of working, on the thinking behind their actions, and on how to improve.

Sharing practices among colleagues is an effective means of encouraging teacher development. It is important to encourage teachers to collaborate with and support colleagues, to reflect on their practice and to build 'team' knowledge and skills. But in some cases, sharing practices can also lead to closing minds regarding new ways of responding to challenging circumstances.

Research suggests that this problem can be addressed by engaging with different stakeholders' views. This would mean bringing together practitioners' ideas, the insights of students and their families, and the knowledge of academic researchers so as to challenge assumptions, stimulate new thinking within a school, and encourage experimentation with creative schemes for engaging learners.

Box 17. A team approach to inclusion in Macedonia

A teacher in Macedonia explains, '**Our school has a policy of accepting all children, regardless of their background. The school's inclusive policy has developed over time: our positive environment of acceptance is the result of a long process of learning and change...** It is compulsory for all teachers to learn about inclusive education through workshops and mentoring. If we want changes to happen, everyone in the school needs to be informed. We want our whole school to have a richer profile of professional development, to strive constantly to learn more and improve ourselves... The school principal, pedagogue and psychologist are involved in observing teachers. We also have open classes where colleagues can sit in and watch each other teach. We meet to compare notes and experiences in relation to all our students, not just those considered to have special needs' (Ivanovska et al., 2012, pp. 4-5). Reflecting on how the school has made progress towards inclusion, the teacher comments, 'We don't have all the answers yet. We still face many challenges. We work hard to plan the learning of every child effectively, but we are not always successful' (Ivanovska et al., 2012, p. 5). This example demonstrates that **developing inclusive practices is a process requiring constant and continuous support in order to be effective.**

Box 18. Students helping teachers to innovate in Portugal

'Diversity in our school is now seen as an opportunity, when approached through collaborative work.'

'The exchange of ideas and research work in teams makes diversity evolve from a problem into a challenge.'

These are typical comments from teachers at Escola Secundária Pedro Alexandrino (ESPA), a secondary school situated in the Portuguese capital city, Lisbon. **For these teachers, diversity is a central issue in their day-to-day work. Over recent years, the school has made many efforts to reflect this diversity.** This has involved trios of teachers supporting one another in analysing how to make their lessons more inclusive. For example, one trio focused on this question: Do all students participate in all the tasks of our lessons? The findings from these activities have led teachers to explore how students could be partners in education, and participate in planning and, sometimes, teaching lessons. **Teachers found that collaborating with their colleagues and with students has led them to think in new ways about how best to respond to learner diversity. It also gave them greater confidence to experiment with different teaching practices** (Messiou et al., 2016).



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Annex 1. Guidance for completing the review

The review framework that follows has been developed to assist countries in examining how inclusion and equity currently figure in their existing policies, and in determining the actions required to improve these policies and their implementation.

Proposed methodology

While each country will establish its own review process in a way that is consistent with its working traditions, its available resources and its timeline, UNESCO suggests the following process:

- **Establish a steering committee:** Under the leadership of the Ministry of Education, a steering committee should be established with a clear political mandate to ensure impact and change. Its role will be to coordinate the consultative process, and the collection of information for the assessment. The committee should be balanced in gender and in representation from different stakeholder groups, including teachers, professional associations, parents, students, researchers, civil society and community organizations.
- **Hold consultations:** Broad-based consultation is necessary in order to arrive at credible assessment. A collective process to stimulate reflection and debate about the levels of progress is encouraged (e.g. using workshops, focus group discussions) as opposed to individual outreach (e.g. interviews or surveys). Different participatory approaches should be considered in order to ensure that stakeholders from marginalized groups, such as ethnic and linguistic minorities, indigenous people, girls and persons with disabilities, will feel empowered to take part in the discussions.
- **Prepare a report:** Following consultations, the steering committee should guide the development of a synthesis report of the key findings, and develop recommendations for actions that are needed to move policy forward. The synthesis report can be accompanied by an action plan that identifies key steps, persons responsible and a timeline for implementing the recommendations (see Annex 3).
- **Monitor implementation of the action plan:** Remembering that education policy is ‘made at all levels’, it will be important to monitor the way that changes are introduced across the system. This monitoring could be one of the steering committee’s continuing roles. As the committee conducts this monitoring, it will be important to keep stakeholders informed of the progress in implementing the plan, using examples of effective practice that inspire widespread involvement in the change process.

How should the review framework be completed?

For each of the four dimensions (concepts, policy, structures, and systems and practices), and the 16 accompanying features in the policy review framework:

1. Review the questions in the first column entitled ‘Areas to be examined’ and identify the types of evidence to collect.
2. Discuss these and other relevant questions that arise while reviewing the evidence.
3. Record any information, insights and recommended actions in the second column entitled ‘Comments’.
4. Circle the response in the third column, ‘Level of progress’, that best fits the current assessment of the actions taken to embed the principles of inclusion and equity in educational policy. This will help in identifying the areas of strength to build on, and the aspects of policy that need attention. This method is consistent with the idea that developing inclusion and equity in education is an on-going process, rather than a single event.

Finally, identify recommended actions for each of the four dimensions.

Dimension 1 | Concepts

Areas to be examined	Comments	Level of progress (Circle one)		
1.1 Inclusion and equity are overarching principles that guide all educational policies, plans and practices				
<p>How far are the principles of inclusion and equity understood and defined within education policies?</p> <p>To what extent are inclusion and equity embedded as core principles in all education policies and plans?</p> <p>To what extent are all national educational policies and plans informed by the principles of inclusion and equity?</p> <p>To what extent are education practices guided by the principles of inclusion and equity?</p>		<p>Inclusion and equity are not yet strong features of educational policies, plans and practices but initial discussions have begun regarding how this can be addressed.</p>	<p>Planning has taken place to strengthen the role of inclusion and equity in relation to educational policies, plans and practices.</p>	<p>Actions have been taken to ensure that inclusion and equity are features of educational policies, plans and practices.</p>
1.2 The national curriculum and its associated assessment systems are designed to respond effectively to all learners				
<p>To what extent is the national curriculum based on the principles of inclusion and equity?</p> <p>To what extent does the national curriculum have the robustness and flexibility to suit all learners?</p> <p>To what degree are the assessment systems used to celebrate different levels of achievement and to support the development of all learners?</p>		<p>The national curriculum and assessment systems are only suitable for some learners but initial discussions have begun regarding how this can be improved.</p>	<p>Planning activities are taking place to review the national curriculum and assessment procedures in relation to inclusion and equity.</p>	<p>Actions have been taken to ensure that the national curriculum and assessment systems respond effectively to all learners.</p>
1.3 All partners who work with learners and their families understand and support the national policy goals for promoting inclusion and equity in education				
<p>To what extent is there a widespread commitment/agreement among all professionals who work with children, youth and adults to act according to the principles of inclusion and equity?</p> <p>To what extent do those who work with children, youth, and adults and their families understand the implications of the principles of inclusion and equity for their roles?</p>		<p>Although agencies have varied understanding of national policy aspirations and plans for promoting inclusion and equity in education, initial discussions have begun to address this issue.</p>	<p>Planning activities are taking place to ensure that agencies understand national policy aspirations and plans for promoting inclusion and equity in education.</p>	<p>Actions have been taken to ensure that agencies understand and support national policy aspirations for promoting inclusion and equity in education.</p>
1.4 Systems are in place to monitor the presence, participation and achievement of all learners within the education system				
<p>How effective are the systems for collecting data (quantitative and qualitative) regarding the presence, participation and achievement of all learners?</p> <p>To what extent are data analysed in order to determine the impact of efforts to foster greater inclusion and equity?</p> <p>To what extent are actions taken in light of the data analysis to strengthen inclusive and equitable settings and practices?</p>		<p>There are limited arrangements for monitoring the presence, participation and achievement of all learners but initial discussions have begun to address this issue.</p>	<p>Planning has begun in establishing systems for monitoring the presence, participation and achievement of all learners.</p>	<p>Actions have been taken to establish effective systems for monitoring the presence, participation and achievement of all learners.</p>

Recommended actions:

Dimension 2 | Policy statements

Areas to be examined	Comments	Level of progress (Circle one)		
2.1 The important national education policy documents strongly emphasize inclusion and equity				
<p>To what extent do all major educational policy documents reflect the principles of inclusion and equity?</p> <p>To what degree are policy priorities informed by the principles of inclusion and equity?</p>		<p>Although there is little mention of inclusion and equity in important national education policy documents, initial discussions have taken place to address this issue.</p>	<p>Planning activities have taken place to make inclusion and equity a feature of important national education policy documents.</p>	<p>Actions have been taken to ensure that inclusion and equity are a feature of important national education policy documents.</p>
2.2 Senior staff at the national, district and school levels provide leadership on inclusion and equity in education				
<p>To what extent do education leaders at the local level encourage the development of inclusive and equitable cultures?</p> <p>To what extent do national policy-makers show clear and sustainable leadership to promote the principles of inclusion and equity?</p> <p>To what extent do local district administrators provide clear and sustainable leadership regarding inclusive education?</p> <p>To what extent are educational leaders (local authorities, senior staff, school principals) trained regarding their responsibilities for enhancing inclusion and removing barriers?</p>		<p>While senior staff at the national and district levels provide limited leadership on inclusion and equity in education, initial discussions have taken place to strengthen this aspect.</p>	<p>Planning has begun to encourage senior staff, at the national and district levels, to provide leadership on inclusion and equity in education.</p>	<p>Actions have been taken to ensure that senior staff at the national and district levels are providing leadership on inclusion and equity in education.</p>
2.3 Leaders at all levels articulate consistent policy goals to develop inclusive and equitable educational practices				
<p>To what extent do national policy-makers encourage the development of inclusive and equitable practices?</p> <p>To what extent do local district administrators take action to encourage the development of inclusive and equitable practices?</p> <p>To what extent do school principals and those who manage other centres of learning (e.g. pre-school provision; special schools) take action to encourage the development of inclusive and equitable practices?</p>		<p>Although there is little evidence that leaders at different levels of the education system articulate consistent policy aspirations for the development of inclusive and equitable educational practices, discussions have taken place to improve this situation.</p>	<p>Planning has taken place to encourage leaders at different levels of the education system to articulate consistent policy aspirations for the development of inclusive and equitable educational practices.</p>	<p>Action has taken place to ensure that leaders at different levels of the education system articulate consistent policy aspirations for the development of inclusive and equitable educational practices.</p>
2.4 Leaders at all levels challenge non-inclusive, discriminatory and inequitable educational practices				
<p>To what extent do systems for supporting schools and other centres of learning identify, challenge and remove non-inclusive, discriminatory and inequitable practices?</p> <p>Where non-inclusive, discriminatory and inequitable practices are found to exist, to what extent are they challenged?</p>		<p>Although leaders at different levels rarely challenge non-inclusive, discriminatory and inequitable educational practices, discussions have taken place to address this issue.</p>	<p>Planning has taken place to encourage leaders at all levels to challenge non-inclusive, discriminatory and inequitable educational practices.</p>	<p>Action has been taken to ensure that leaders at all levels challenge non-inclusive, discriminatory and inequitable educational practices.</p>

Recommended actions:

Dimension

3 | Structures and systems

Areas to be examined	Comments	Level of progress (Circle one)		
3.1 There is high-quality support for vulnerable learners				
<p>How effective are the systems for identifying vulnerable learners?</p> <p>To what extent are there flexible arrangements for ensuring that support is available to individuals as and when necessary?</p> <p>To what degree are families seen as partners in supporting their children's education?</p> <p>To what extent are learners themselves asked about their need for support?</p>		While support for vulnerable learners is of variable quality, discussions have taken place to consider how this can be improved.	Planning has taken place to improve the quality of support for vulnerable learners.	Actions have taken place to ensure high- quality support for all vulnerable learners.
3.2 All services and institutions involved with learners and their families work together in coordinating inclusive and equitable educational policies and practices				
<p>To what extent do schools (and other education providers) collaborate with other relevant sectors, such as health and social work?</p> <p>To what extent is there effective cooperation between schools and other centres of learning?</p> <p>To what degree do institutions and services within districts have a shared understanding of inclusion and equity, and work together?</p> <p>To what extent do both public and private education providers apply inclusive and equitable education practices?</p>		Although the work of services and institutions tends not to be well coordinated, discussions have taken place to consider how this can be improved.	Planning has taken place to encourage services and institutions to collaborate.	Actions have been taken to ensure that services and institutions involved with learners and their families work together.
3.3 Resources, both human and financial, are distributed in ways that benefit potentially vulnerable learners				
<p>To what extent are all learners seen as being of equal importance educationally?</p> <p>To what extent are available resources used flexibly, and targeted to support participation and learning?</p>		While there are concerns that resources are not distributed fairly, discussions have taken place to address this issue.	Planning has taken place to improve the way resources are distributed, focusing in particular on the need to support vulnerable learners.	Actions have been taken to ensure that resources are distributed fairly, focusing in particular on vulnerable groups of learners.
3.4 There is a clear role for special provision, such as special schools and units, in promoting inclusion and equity in education				
<p>To what extent do special schools and units have a common understanding of inclusion and equity?</p> <p>To what extent do students from special schools and units have opportunities to take part in activities within mainstream schools?</p> <p>To what degree is the expertise made available in special settings also made available to teachers in other schools?</p>		While special provision is mainly separate from the mainstream education system, discussions have taken place to consider how closer links can be encouraged.	Planning has taken place to encourage ways of creating stronger links between special provision and mainstream education institutions.	Action has gone on to ensure that special provision has a role in promoting inclusion and equity in education.

Recommended actions:

Dimension 4 | Practices

Areas to be examined	Comments	Level of progress (Circle one)		
4.1 Schools and other learning centres have strategies for encouraging the presence, participation and achievement of all learners from their local community				
<p>To what degree do teachers use a range of pedagogical strategies to cater to learner differences?</p> <p>To what extent are there effective procedures for taking account of students' views regarding their learning and aspirations?</p> <p>To what degree do school leaders support the presence, participation, and achievements of all learners?</p>		While there is variation in the quality of the strategies used for encouraging presence, participation and achievement of all learners, discussions have taken place to improve this situation.	Planning has taken place to strengthen the quality of the strategies used to encourage the presence, participation and achievement of all learners.	Actions have taken place to ensure that there are effective strategies for encouraging the presence, participation and achievement of all learners.
4.2 Schools and other learning centres provide support for learners who are at risk of underachievement, marginalization or exclusion				
<p>To what extent are teachers skilled in assessing the progress of individual students and in supporting their development?</p> <p>To what extent do teaching and non-teaching staff take account of the cultures, identities, interests and aspirations of all their students in order to enhance their learning?</p> <p>To what extent do teaching and non-teaching staff in schools, and other centres of learning, work closely with families in ensuring support for students?</p>		Although support for vulnerable learners is varied in quality, discussions have taken place to bring about improvements.	Planning has been going on to strengthen the support provided for learners at risk of underachievement, marginalization and exclusion.	Action has been taken to ensure effective support for learners at risk of underachievement, marginalization and exclusion.
4.3 Teachers and support staff are prepared to respond to learner diversity during their initial training				
<p>To what extent does the teacher education curriculum for all teachers emphasize the principle of inclusion?</p> <p>To what extent are teacher trainees guided to develop positive attitudes towards student diversity?</p> <p>To what extent are teacher trainees helped to develop teaching pedagogies that respond positively to student diversity?</p>		The training of teachers and support staff for responding to learner diversity is varied in quality but discussions have taken place to bring about improvements.	Planning has taken place to strengthen the ways that teachers and support staff are trained to respond to learner diversity.	Actions have been taken to ensure that teachers and support staff have effective training in respect to the way they respond to learner diversity.
4.4 Teachers and support staff have opportunities to take part in continuing professional development regarding inclusive and equitable practices				
<p>To what extent do schools and other centres of learning have effective staff development programmes related to inclusive practices?</p> <p>To what extent do teachers have opportunities to see one another working in order to share ideas and practices?</p> <p>To what extent are there opportunities for teachers to attend in-service courses and benefit from customized school support regarding the development of inclusive practices?</p>		While there are only limited opportunities for professional development regarding inclusive and equitable practices, discussions have taken place to address this concern.	Planning has taken place to create more professional development opportunities that focus on inclusive and equitable practices.	Action has been taken to ensure that there are sufficient professional development opportunities that focus on inclusive and equitable practices.

Recommended actions:

Annex 3. Action plan guidelines

The action plan will help you to strengthen inclusion and equity in education policy. In developing an action plan, keep these important points in mind:

- Identify discrete actions that are realistic, attainable and measurable.
- Develop a specific timeline and schedule for completing these actions.
- Identify resources necessary for completing the activities, including plans for acquiring those resources.
- Identify those persons who will be responsible for working with the different stakeholders that will move the suggested actions forward.

Sample action plan format:

Detailed actions/activities to embed inclusion and equity in policy	Person responsible	Resources required	Timeline

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A guide for ensuring inclusion and equity in education

Sustainable Development Goal (SDG) 4 identifies inclusion and equity as key principles for education systems. Built around the idea that “every learner matters and matters equally”, this guide highlights the vital role of inclusive and equitable education in transforming education systems worldwide.

The guide contextualizes and defines the concepts of inclusion and equity, and offers an assessment framework that enables country stakeholders to review and evaluate the level of equity and inclusion in existing policies, decide the actions needed to improve policies and their implementation, and monitor progress as actions are taken. The guide draws on international evidence and programme experience, and provides examples of good practice around the world of steps being taken to create inclusive and equitable education systems.



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