

INCLUSIVE EDUCATION: ACHIEVING EDUCATION FOR ALL BY INCLUDING THOSE WITH  
DISABILITIES AND SPECIAL EDUCATION NEEDS

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## GLOSSARY OF TERMS

ADB	Asian Development Bank
AIR	American Institutes for Research
CAS	Country Assistance Strategy
CBR	Community Based Rehabilitation
CRC	Convention on the Rights of the Child
CERI	Centre for Educational Research and Innovation
CSIE	Centre for Studies on Inclusive Education
DESA	Department of Economic and Social Affairs (United Nations)
DPEP	District Primary Education Program
DPI	Disabled People's International
DPO	Disabled Peoples' Organization
EFA	Education for All
ESCAP	Economic and Social Commission for Asia and the Pacific
ICF	International Classification of Functioning and Disability
ICIDH-2	International Classification of Functioning and Disability
IDA	International Disability Alliance
IDEA	Individuals with Disabilities Education Act
IE	Inclusive Education
IEP	Individualized Education Program
ISCED	International Standard Classification of Education
MDG	Millennium Development Goals
NCERI	National Centre on Educational Restructuring and Inclusion
NCERT	National Council for Educational Research and Training
OECD	Organization of Economic Co-operation and Development
PER	Program Effectiveness Review
PIED	Project Integrated Education for the Disabled
PRSP	Poverty Reduction Strategy Paper
SEN	Special Education Needs
SIEDC	Scheme for Integrated Education of Disabled Children
SNE	Special Needs Education
UNICEF	United Nations Children's Fund
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNCRC	United Nations Convention on the Rights of the Child
UPE	Universal Primary Education
WHO	World Health Organization

# **Inclusive Education: Achieving Education for All by Including those with Disabilities and Special Education Needs**

## **Executive Summary**

### **I. Introduction**

In a report for UNICEF, Bengt Lindqvist, the United Nations Special Rapporteur on Human Rights and Disability, provided the following challenge:

“A dominant problem in the disability field is the lack of access to education for both children and adults with disabilities. As education is a fundamental right for all, enshrined in the Universal Declaration of Human Rights, and protected through various international conventions, this is a very serious problem. In a majority of countries, there is a dramatic difference in the educational opportunities provided for disabled children and those provided for non-disabled children. It will simply not be possible to realize the goal of Education for All if we do not achieve a complete change in the situation.”

Addressing this widely recognized need for change, the Dakar Framework for Action adopted a *World Declaration on Education for All* (EFA) in 2000, which affirmed the notion of education as a fundamental right and established the new millennium goal to provide every girl and boy with primary school education by 2015. EFA also clearly identified Inclusive Education as one of the key strategies to address issues of marginalization and exclusion. The fundamental principle of EFA is that all children should have the opportunity to learn. The fundamental principle of Inclusive Education is that all children should have the opportunity to learn *together*.

Significant numbers of disabled children and youth are largely excluded from educational opportunities for primary and secondary schooling. Exclusion, poverty and disability are linked. Education is widely recognized as a means to develop human capital, to improve economic performance, and to enhance people’s capabilities and choices. Exclusion from education can result in a staggering loss of freedom and productivity in the labor market. The international community (at least at the policy level) has recognized education as a fundamental child right and has committed to a framework for action to address this right, and to redress exclusion as directed by EFA 2000.

Inclusive Education in the context of the goals of Education for All is a complex issue, and no coherent approach is evident in the literature. First, at a basic level of policy, unlike health and labor markets, disability is seen as an array of issues crossing health, education, social welfare, employment sectors, etc. As a result, policy development in relation to individuals with disabilities faces challenges to avoid fragmented, uneven, and difficult-to-access services. Second, Inclusive Education may be implemented at different levels, embrace different goals, and be based on different motives, reflect different classifications of special education needs (SEN), and provide services in different contexts. Specific goals may focus either on improved educational performance and quality of education, or on autonomy, self-determination, proportionality, consumer satisfaction or parental choice. Some of these goals may conflict and produce tensions. Similarly, motives for Inclusive Education may derive from dissatisfaction with the system, from economic or resource allocation concerns, or from a vision of educational reform. Finally, SEN services may be viewed as a continuum of placement options (multi-track approach), as a distinct education system (two-track approach) or as a continuum of services within one placement—the general education school and classroom (one-track approach). All of the variants produced by these different aims, levels, systems and motives may be called Inclusive Education.

In order to understand exclusion and strategies for working toward inclusion, it is necessary to examine research on policy and practice at the micro-level (schools and communities), at the meso-level (educational systems and external agency support services), and at the macro-level (national/international policy and national legislation).

## **II. Inclusive Education Practice Lessons from the North**

Large-scale cross-national studies in countries of the North provide extensive information on best practice for Inclusive Education. A high priority involves teacher training, perhaps not surprisingly, due to the fact that personnel resources constitute approximately 80% of all school expenditures. All of the studies cited recommend that teacher training focus on enhancing the skills of classroom teachers in areas of pedagogy, curriculum development and adaptation. Training should be intentional and classroom-based, intensive, and on-going in order to promote sustainable effective practice. Second, in priority, is school-as-a-whole reform to support classroom practice. Important factors in whole-school reform include involved leadership, co-ordination of services, multi-disciplinary planning, parental involvement in decision-making, and in-school support systems to build capacity.

Although a definite trend toward inclusive practice and increase in inclusive education programming is evident in all countries of the North, considerable variation exists, most notably in the areas of classification and placement decisions. In addition, all countries face several challenges. The most significant of these are meeting the needs of SEN students in secondary schools, funding, and resource constraints. Special issues of accountability are exerting enormous pressures on schools to document effectiveness in terms of outcomes. This emphasis on accountability represents a significant shift from issues of access and quality of services. Systems of evaluation and documentation of effectiveness in terms of outcomes are lacking and need attention. While the studies provide some evidence of positive Inclusive Education effects, gaps in research are most noticeable in this area. Finally, significant gender differences exist that reveal a bias toward boys and were noted as a potentially significant area of concern that was largely omitted in the studies. These lessons from the North constitute a first-wave of Inclusive Education reform in terms of practice.

## **III. Inclusive Education Practice: Lessons from the South**

In order to describe the dynamics and comprehensiveness of Inclusive Education in the South, this review uses a framework for analysis that includes four domains of inputs, processes, outcomes, and contextual factors in an open-system. An open-system not only accounts for external factors influencing Inclusive Education (e.g., policy, legislation, cultural and socio-economic conditions), but considers these 'external' factors as integral components of Inclusive Education development as a whole. This open-system is a particular strength of Inclusive Education in countries of the South.

The most challenging and critical aspects of Inclusive Education (IE) development in terms of *inputs* include: (1) student access, retention and drop-out rates; (2) finding, identifying, and encouraging children to go to school; (3) poverty and associated characteristics of student background; (4) attitudes toward SEN and students with disabilities; (5) conditions of teachers' work; (6) flexible, adaptive and functional life-skills curriculum relevant to students' lives. In terms of *process*, school climate, collaboration, support, and integrated services/teacher training prove challenging as process domains. *Outcomes* of Inclusive Education are often illusive and difficult to measure. Student achievement tests of content knowledge provide only one indicator of impact, and are not strongly linked to success in adult life, nor do they provide a measure of creative and analytical problem-solving skills needed for survival. The challenge is to measure success in terms of broad indicators of outcomes and impact. Research suggests that IE programs should look for improvements in terms of *contextual factors*: individual, family, community, organization, and government. Specific indicators include: presence, participation, choice, respect, knowledge and skills.

### **Validated Program Approaches and Key Lessons**

1. Education goals are often elusive and difficult to measure.
2. Development takes time.

3. Process is often as important as product.
4. Decentralization and autonomy are important tools but not panaceas for solutions.
5. Partnerships and networks are needed at all levels of the system.
6. Integrated and multi-sectoral approaches to learning are essential.
7. Good practices must be carefully analyzed and promoted, and models of good practice must be creatively used.
8. Diversity, not standard solutions to complex problems, must be the norm.
9. Mobilization and advocacy at all levels are essential.

Gaps in the literature encompass: (1) identification and services of the majority of SEN students who have no visible impairments; (2) strategies and successful approaches to address access and equity barriers to enrollment and participation; (3) strategies to address retention of qualified teachers; (4) data regarding program impact and outcomes; (5) systematic models to address knowledge transfer; (6) secondary, tertiary, adult and alternative education programs; (7) use of technology to support Inclusive Education; and, (8) attention to social context. This last gap is perhaps the most significant of all, especially considering the numerous social, political and economic context barriers to attendance and participation that have been identified in the literature.

Several critical issues emerge from the IE literature as an opportunity to refocus efforts in Inclusive Education and to improve effective practice. This review has uncovered four that appear to be compelling: (1) human rights, (2) decentralization, (3) partnerships for change, and (4) integrated teacher training. Exemplars from several of the 24 'Fast-Track' Countries of the South reveal significant needs in these four areas that also appear to be associated with particular regions. These needs also appear to be associated with emerging strengths that could be capitalized on for future study.

In *Sub-Saharan Africa, Disabled Peoples Organizations (DPOs) and Human Rights* constitute a promising area for future study. Zambia, Zimbabwe and South Africa share borders and a strong history of active disability rights organizations. Most DPOs in the region have been actively engaged in education activities—formal, informal and non-formal sectors for at least a decade. The South African Federation of the Disabled (SAFOD) enjoys a strong regional presence, providing coordination and support for national-level initiatives. The African Decade of Disabled Persons 2000-2009 was declared by the Organization for African Unity, and has received support from the United Nations. The African Decade has a number of key objectives including poverty alleviation and reduction through economic support and education; advocacy and lobbying for policies and legislation; and awareness raising on disability issues and human rights in Africa. A Basic Education Sub-sector Investment Program Support Project has been underway in *Zambia* since 1999. The project contains a strong law and justice component. The regional strengths of DPO human rights activities could be used to improve the capacity/impact of education and health sectors in both Zimbabwe and Zambia for *all* children and youth.

*Latin America, Democratization, and Decentralization:* some of the most innovative Inclusive Education programs originate in several of these countries. Many are states in transition from authoritarian regimes to democratic states. Democratization has been accompanied by a strong trend toward decentralization across sectors. Transition and its democratic ideologies have influenced school governance as well as teaching and learning. Columbia, Honduras, and Guatemala all have experimental Escuela Nueva Schools that operate with a clear philosophy and vision of inclusion. In *Honduras*, the *Vermont-Honduras partnership* has been collaborating around teacher training, SEN and school restructuring for Inclusive Education since 1975. Honduras is one of the few countries that report experience and success with Inclusive Education at the secondary level. Efforts in Honduras' IE schools have also included integration of multi-grade teaching, intercultural and bilingual education. A community-based education program supported by World Bank funding began in Honduras in 2001. The CBE Program's goal is to improve the quality of inter-cultural and bi-lingual education among indigenous communities. The Program includes a strong parent and school-based component, which are central activities in the Escuela Nueva IE Schools. These conditions provide an opportunity to capitalize on the strengths and philosophy, rich and extensive history of IE in Honduras to the benefit of both programs.

***East Asia/Pacific, Economies of Scale and Partnerships for Change.*** Nearly two-thirds of the world's disabled people live in South and Southeast Asia. Disabled women and girls face perhaps some of the most severe discrimination of any region in the world. Strong cultural beliefs about disability as an ancestral punishment still predominate in Asian societies. *Vietnam* is one of the world's most densely populated countries, with an estimated one million disabled children. The incidence and prevalence rates for children may be inflated due to the effects of Agent Orange. Improving the quality of education and basic health care, especially among the poor, are priority issues in Vietnam. While access to primary education has reached 92%, PRSPs urge the Vietnamese government to enhance efforts and to specify detailed strategies for reaching the last 6-8% still without access to school. Innovative programs to identify and refer children have been undertaken. This literature review indicates that the majority of these children may well be those with SEN and/or impairments. Currently, the World Bank has provided investment funds for three active projects in Vietnam relevant to Inclusive Education: The *Higher Education Project*, *Population and Family Health Project*, and *Primary Teacher Development Project*. The experiences and expertise of the CST/CBR partnership program to link health and education sectors to enhance lives of children with impairments and their families could be capitalized on to strengthen these projects. While the South faces major challenges in terms of resources and access within the Dakar Framework, creative solutions to meet EFA goals provide opportunities for a way forward.

***South Asia, Embedded/Integrated Teacher Training.*** *India* has a population of approximately 982.2 million people (16.7% of the world population). With 50% of the population below poverty levels, the country has the largest concentration of poor people in the world. Forty percent of the population is under 18 years of age. The number of school-age children with disabilities in India may be as high as 50 million. If children of poverty and those with other forms of disadvantage who may benefit from SEN are added to this estimate, the potential demand and the extent of the unmet need for Special Needs Education is staggering.

To meet this need, a key strategy involves preparing teachers to instruct SEN learners. An Asian Development Bank report (2002) highlights teacher preparation and training as a central policy in the entire Asia and Pacific Region. This policy recommends two strategies for implementation: restructuring teacher preparation, and continuous staff development. As a priority, these policy/strategies need to be integrated into any existing instructional policy and strategies for the improvement of schooling.

Both the ADB policies in Asia and ESCAP (Economic and Social Commission of Asia and the Pacific) sponsored experiences concerning teacher preparation and training are supported by the 1986 National Policy on Education, and can be described as 'embedded.' That is, both agencies view teacher training as necessarily part of the larger context of school reform. One project that illustrates promising practice with respect to embedded teacher training is the TDI Project, *Project Integrated Education for the Disabled* (PIED). Twenty-two institutions and organizations from all over India collaborated on the project, with the goal of developing IE as an integral part of institutional programs. The training was designed in three phases of increasingly intensive development, focused on child-centered teaching and learning strategies, and incorporated practice and feedback sessions. As part of the training, each school prepared its own action research proposal for implementation. Positive effects were documented in terms of changes in teacher and pupil attitudes to teaching and learning, and in pupil achievement. However, the potential opportunity for integrated teacher training and collaboration with teachers colleges and university departments of education (both special education and general education) has not been well documented. Collaboration for embedded teaching at tertiary levels of education could build on the strengths of continuous staff development in PIED, while at the same time begin to address the need for restructuring teacher preparation programs. The current DPEP project sponsored by The World Bank could build on these experiences to develop a seamless web of preparation and staff development for Inclusive Education.

#### **IV: Economic Issues**

Financing and support of educational services for students with special needs is a primary concern for all countries, regardless of available resources. Countries of the North are experiencing constraints as

well as countries of the South, albeit with vast disparities. In the last decade, countries of the North have experienced widespread economic retrenchment. Tax bases have diminished at the same time that costs have risen dramatically. In these countries, new and expensive medical interventions, combined with expanding social services and welfare benefits, along with an increasing aging population have all increased pressures on spending—resulting in powerful incentives to control education budgets.

At the same time, countries of the South have also been subject to immense pressures – rapid population growth, increasing poverty, war and disease – have destabilized economies and produced strictly limited financial resources. Regardless of relative wealth, education in all countries has had to compete with other economic priorities such as health care, social welfare, and defense budgets. However, education is widely seen as a means to develop human capital, to improve economic performance, and to enhance individual capabilities and choices in order to enjoy freedoms of citizenship. The strategy of Education for All is driven by a human-rights discourse and clear economic purpose linked to development.

Within this global context, the Salamanca Statement of 1994 and a growing body of research assert that Inclusive Education is not only cost-efficient, but also cost-effective, and that “equity is the way to excellence” (Skrtic, 1991, OECD, 1999). This research seems to promise increased achievement and performance for all learners (Dyson & Forlin, 1999: 35). Within education, countries are increasingly realizing the inefficiency of multiple systems of administration, organizational structures and services, and the financially unrealistic options of special schools.

Despite the common experience of economic pressures and constraints among countries of the North and South, the literature related to economic issues in Inclusive Education emphasizes different aspects of economic reform. The plethora of large-scale, cross-country studies undertaken by countries of the North typically focus on national and municipal government funding formulas for allocation of public monies. In countries of the South, the literature on resource support for inclusive education services focuses instead on building the capacity of communities and parents as significant human resource inputs, and on non-governmental sources of funding. This literature also tends to be case-based on particular countries, regions or programs, rather than large-scale, multi-national studies as in the North. Strategies for resourcing Inclusive Education in countries of the South are much more varied and broader in scope—characterized by a focus on linking and coordinating services with health sectors, universities, community based rehabilitation programs and vocational training programs, etc.

EFA 2000 Global Assessment reports that worldwide 63% of education costs are covered by governments, 35% by private sector, and 2% by external support. UNESCO (1995) documents special education funding sources in the 63 countries reporting as a mixture of state, voluntary organizations, NGOs and parents. Forty-percent of countries in this study reported government as the sole source of special education provision. In many developing countries, the state provided all or almost all funding for special education. Voluntary bodies were the major alternative source (e.g., Lesotho, Malawi) and the major source in Uganda.

In an important sense, across countries, the issue of resources appears not so much as an issue of levels of funding, as it is an issue of distribution and allocation of funds. Specifically, fiscal policies and their built-in incentives (or disincentives) for Inclusive Education “may be as important in affecting program provision as the amounts allocated” (Parrish, 2002). Fiscal policies at the government level center around formulaic models that may be categorized in three basic types: child-based models, resource-based models, and output-based models. Almost all countries in the studies reviewed reported using one or more of these basic types in combination.

A seventeen-country study of European countries recommended through-put resource-based funding as the best option, with the caveat that it should be accompanied by some form of output funding (i.e., funds tied to student outcomes). In general, resource-based models encourage local initiatives to develop programs and services, but without some evaluation or monitoring mechanism, there is no incentive to produce quality programs or to seek improvements. Overall, resource-based models in Europe are seen as having great potential because funding focuses on teacher resources and support to provide quality education for special needs students.

Several characteristics of funding models are inherent across types. These characteristics include: (a) decentralization forms according to locus of destination; (b) inherent incentives and disincentives that produce various forms of strategic behavior (either supporting or providing barriers to Inclusive Education) on the part of schools, districts, and national governments; (c) the effectiveness depends on the evaluation, monitoring and accountability measures put in place. While there is no agreement regarding the efficacy and efficiency of any one funding formula world-wide, several studies suggest general parameters: (1) formulas should avoid restrictiveness in student placement, and (2) funding should provide 'seamless' services toward Education for All (i.e., use a whole-school approach and blend funding support between special education and general education programs). Some states reporting the most success emphasized dollar incentives for Inclusive Education, for a comprehensive system of professional development, and for on-going technical support to schools (Bowers & Parrish, 2000).

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

#### **V. Legal Issues: Progress towards the right to Inclusive Education**

The importance of legal issues cannot be underestimated. Most policy documents on Inclusive Education begin with the recommendation that a policy framework and legislative support must be in place to ensure access to and equal participation in Inclusive Education programs. The literature also makes clear that the impetus for Inclusive Education has been put on the agenda and propelled forward by Disabled Peoples Organizations. DPOs have achieved this agenda through organized political pressure and mobilizing allies. As a result, progress towards Inclusive Education has been slow but steady over the last twenty-five years.

Current conventions and instruments that uphold SEN and disabled children's rights to Inclusive Education include:

- International Covenant on Civil and Political Rights (1966)
- International Covenant on Economic, Social and Cultural Rights (1976)
- Convention on the Rights of the Child (1990)
- United Nations Standard Rules on Equalization of Opportunities for Persons with Disabilities

With respect to enforcing these rights, several reports provide some basic information. Specifically, these reports document that legislation pertaining to Inclusive Education appears to be in place in majority of countries reporting. However, the extent to which services are implemented, and the extent to which children and youth have access to them is not known. Further, the UNCRC goals for the new millennium are inclusive of those with special needs, but gaps in safeguards and monitoring strategies exist. The new Flagship on EFA and Rights of Persons with Disabilities will work on this gap as a strategic objective. The data gathered on children and youth with special education needs and disabilities will be critical to future planning. One indication of a growing need is the comparative data collected on children in school and children with no access to school. In 1990 (Jomtien) there were 599 million children in school as compared to 681 in 2000 (Dakar). At the same time, the number of children reported with no access to school grew from 106 million to 117 million. Many SEN and disabled children and youth are likely to be in this latter category. The data that do exist, combined with the lack of a comprehensive international convention to protect the rights of disabled people, are two significant reasons DPOs are urging a UN Special Convention.

The *Expert Group Meeting on International Norms and Standards Relating to Disability (1998)* promulgated detailed specific strategies for implementing legal rights pertaining to individuals with

disabilities at national and international levels. At the national level, several of these could have a significant impact on Inclusive Education. With respect to projects funded by multi-lateral assistance and by international funding institutions such as the World Bank, the Expert Group recommends the following:

- (a) encourage states to adopt special policies and legislation that promote the full inclusion of persons with disabilities in all aspects of social, cultural and economic life;
- (b) develop and promote minimum standards relating to accessibility and related disability rights issues in connection with the projects they sponsor and fund;
- (c) encourage and help facilitate the development of working relationships between disability community advocate groups in different countries, utilizing the networks and partnerships they have worldwide, thereby encouraging the development of trans-national strategies to respond to the problems identified;
- (d) disability advocacy groups in countries/regions affected by the operation of trans-national groups should explore such strategies as the filing of litigation against trans-national corporations operating in their countries to enforce the extraterritoriality provisions of disability law in those corporations' home countries.

One significant policy that many proposals for the way forward have in common is the need to include persons with disabilities and special education needs as full participants in the bodies and procedures by which both laws and policies, and provision of services are formulated, implemented and evaluated. This policy is seen not only as a political and moral imperative, but a cost-effective one as well.

Clearly, much has been achieved, but much is still left to be accomplished in the progress towards an inclusive society and rights to Inclusive Education within society.

## **VI: Policy/Practice Implications: Critical issues in Inclusive Education**

The literature on Inclusive Education makes clear that system levels (macro, meso, micro) and their dimensions of inputs, processes, outcomes, external factors, are interrelated and context-dependent. Taken as a whole, this review provides fertile ground for policy/practice implications to address next steps. Numerous comprehensive policy recommendations and frameworks for action have been developed—both general and specific to SEN learners—in relation to Millennium Development Goals. This review cannot begin to articulate Inclusive Education policy recommendations in the detail that these documents offer. In fact, it would be presumptuous for a single author to undertake this task.

This particular review does, however, illuminate several critical policy/practice issues and their implications concerning Inclusive Education. Typically, policy relevant to Inclusive Education begins with a declaration (e.g., the Salamanca Statement) or convention (e.g., Convention on the Rights of the Child) and follows with a Framework for Action or Implementation Handbook (CRC). In between declarations and frameworks lies a broad terrain of policy/practice critical to implementing Inclusive Education. Policy/practice can be characterized as a struggle that takes different forms and is exercised at different levels by social actors with different objectives and under different conditions and power relations. Nine critical issues have been identified: (1) Decentralization, (2) Finance/Resource Allocation, (3) Access and Participation, (4) Pre-service Teacher Training and In-Service Professional Development, (5) Universal Human Rights and IE Policy/Legislation, (6) School Restructuring and Whole-School Reform, (7) Identification and Placement, (8) Assessment, Accountability, Efficiency and Effectiveness, and (9) Building Capacity and Sustainability through NGO, Community, and Multi-Sector Participation. Each issue is analyzed in terms of its potential for facilitating or inhibiting Inclusive Education; e.g., the policy forms and the actions of decision-makers who ultimately enact policy related to these issues determine their potentials. Specific policy implications are discussed that derive from this analysis, and they should be useful to educators and policy-makers.

Today's inequalities and state of progress toward EFA provide both challenges and opportunities. If we are to meet our collective Millennium Development Goals—ratified by 152 countries worldwide—we are challenged to commit ourselves to the CRC Guidelines and EFA Frameworks for Action. Our

opportunities will manifest themselves in day-to-day tasks that we undertake with individual children, in classrooms, in schools and in society. Universal primary education and *Education for All—Together* are worthy goals. It is hoped that this review has made a contribution to them.

## **I. Inclusive Education: Achieving Education for All by Including those with Disabilities and Special Education Needs**

### **Introduction**

In a report for UNICEF, Bengt Lindqvist, the United Nations Special Rapporteur on Human Rights and Disability, provided the following challenge:

“A dominant problem in the disability field is the lack of access to education for both children and adults with disabilities. As education is a fundamental right for all, enshrined in the Universal Declaration of Human Rights, and protected through various international conventions, this is a very serious problem. In a majority of countries, there is a dramatic difference in the educational opportunities provided for disabled children and those provided for non-disabled children. It will simply not be possible to realize the goal of Education for All if we do not achieve a complete change in the situation.”<sup>1</sup>

Addressing this widely recognized need for change, the Dakar Framework for Action adopted a World Declaration on Education for All in 2000 which affirmed the notion of education as a fundamental right and established the new millennium goal to provide every girl and boy with primary school education by 2015. EFA also clearly identified Inclusive Education as one of the key strategies to address issues of marginalization and exclusion. “Inclusion was seen as the fundamental philosophy throughout UNESCO’s programs and the guiding principle for the development of EFA” (UNESCO, 2002: p. 17). This principle originates from several key international declarations that specifically address those with Special Education Needs (SEN). Central among them is the Salamanca Statement and Framework for Action endorsed by 92 governments and 25 international organizations at the World Conference on Special Needs Education, June 1994 in Salamanca, Spain. This key document identifies Inclusive Education as the means by which Education for All may be achieved. The Salamanca Statement proclaims that every child has unique characteristics, interests, abilities, and learning needs and that “those with special education needs must have access to regular schools which should accommodate them with a child-centered pedagogy capable of meeting those needs.” The Salamanca Statement also asserts that educational systems that take into account the wide diversity of children’s characteristics and needs “are the most effective means of combating discriminatory attitudes, creating welcoming communities, building an inclusive society and achieving education for all; moreover, they provide an effective education to the majority of children and improve the efficiency and ultimately the cost-effectiveness of the entire education system.”<sup>2</sup>

Because of the high level of global participation in its development, the Salamanca Framework for Action provides perhaps the best cross-cultural definition of Inclusive Education in action.

### **The Inclusive School**

The fundamental principle of the inclusive school is that all children should learn together, wherever possible, regardless of any difficulties or differences they may have. Inclusive schools must recognize and respond to the diverse needs of their students, accommodating both different styles and rates of learning and ensuring quality education to all through appropriate curricula, organizational arrangements, teaching strategies, resource use and partnerships with their communities. There should be a continuum of support and services to match the continuum of special needs encountered in every school.

¶7, **Salamanca Framework for Action, 1994.**

<sup>1</sup> Lindqvist, B. (1999). Education as a fundamental right. *Education Update*, 2(4),7.

<sup>2</sup> *The Salamanca Statement on Principles, Policy and Practice in Special Needs Education*, paragraph 2. [www.unesco.org/education/educprog/sne/salamanc/stateme.html](http://www.unesco.org/education/educprog/sne/salamanc/stateme.html)

A growing body of research supports the Salamanca Statement and its principles.<sup>3</sup> Metts' (2000) report is typical of the evidence in support of Inclusive Education. Specifically, Metts cites a 1993 World Bank study of Special Education in Asia which concluded that: 1) there are personal, social and economic dividends to educating primary school aged children with Special Education Needs in mainstream schools; 2) most Special Education Needs can be successfully and less expensively accommodated in integrated schools than in segregated institutional settings; and 3) the vast majority of children with special education needs can be cost-effectively accommodated in regular primary schools.<sup>4</sup>

## **Background**

Inclusive Education in the context of the goals of Education for All is a complex issue, and no coherent approach is evident in the literature. First, at a basic level of policy, unlike health and labor markets, disability is seen as an array of issues crossing health, education, social welfare, employment sectors, etc.<sup>5</sup> As a result, policy development in relation to individuals with disabilities faces challenges to avoid fragmented, uneven, and difficult-to-access services. Second, Inclusive Education may be implemented at different levels, embrace different goals, and be based on different motives, reflect different classifications of special education needs, and provide services in different contexts. For example, Kobi identified six levels of Inclusive Education: physical, terminological, administrative, social, curricular and psychological.<sup>6</sup> Aims may focus on integration of 'special education needs' (SEN) students in classrooms or on changing societal attitudes to promote societal integration.<sup>7</sup> Specific goals may focus either on improved educational performance and quality of education, or on autonomy, self-determination, proportionality, consumer satisfaction or parental choice. Some of these goals may conflict and produce tensions. Similarly, motives for Inclusive Education may derive from dissatisfaction with the system, from economic or resource allocation concerns, or from a vision of educational reform. Finally, SEN services may be viewed as a continuum of placement options (multi-track approach), as a distinct education system (two-track approach) or as a continuum of services within one placement—the general education school and classroom (one-track approach).<sup>8</sup>

All of the variants produced by these different aims, levels, systems and motives may be called Inclusive Education. Further confusion arises when inclusive education is taken to be a fixed state instead of a dynamic process, as was pointed out in UNESCO's Review of the Present Situation of Special Education (Hegarty, 1988). A further layer of complexity involves the definition of special education need. Classification systems vary to a great extent from country to country, and even within countries. Some countries have adopted a definition based on need for special education services, and do not count or label students. The United Kingdom, for example, in its Warnock report of 1978 defined disability on this basis. Other countries apply a two-tier definition based on extent and type of disability. These countries base entitlement to Special Education on two conditions: under-educational performance (observed or predicted), and "objective cause". For those countries that use traditional "objective cause" labels to determine special education need, categories vary. For example, Denmark uses two categories, while

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<sup>3</sup> Ferguson, D., 1992; Baker, Wang & Walberg, 1994; Lipsky & Gartner, 1997; J. Allan, 1999; Armstrong, Armstrong & Barton, 2000; Sailor, 2002; Thomas & Glenny, 2002, Vinneau, 2002.

<sup>4</sup> 1993 World Bank Development Report as reported in Robert Metts, *Disability, Issues, Trends and Recommendations for the World Bank*. Social Protection Discussion Paper No. 0007, Washington, D.C.: World Bank, 2000, p. xi. For a more details on cost differentials, see the Economic Issues section of this report.

<sup>5</sup> D. Cameron & F. Valentine (2001). *Disability and Federalism: Comparing different approaches to full participation*. McGill-Queens University Press: Montreal.

<sup>6</sup> In C. J. W. Meijer, Sip Jan Pijl & S. Hegarty (1994). *New Perspectives in Special Education: A six country study of integration*. Routledge: London & New York. Pp. 5-6.

<sup>7</sup> The terms 'special education need' (SEN) or 'special needs education' (SNE) are used quite frequently in the literature on Inclusive Education. Where the terms are used, they should be seen as referring to the broader context and definition of the term; i.e., all forms of support and teaching within separate and 'mainstream' education. Reported in EADSNE, 1999: p. 18.

<sup>8</sup> European Agency for Development in Special Needs Education (2003). *Special Needs Education in Europe*. A Thematic Publication by EADSNE. Brussels. [www.european-agency.org](http://www.european-agency.org)

Poland and the United States have more than 10 categories of disability. Most countries use the categorical approach with a range of 4-10 types of special needs. In 'traditional' societies, four categories/types of disability are usually recognized: physical disability, blindness, deafness, and mental retardation. Further, countries may also include non-disabled individuals in special education needs categories; e.g., refugee children, gifted and talented children (who may also have impairments), and those with various learning difficulties and disadvantages that result in educational underperformance (e.g., street and working children, children from nomadic populations, children who have lost their parents through AIDS or civil strife, children from linguistic, ethnic or cultural minorities) .<sup>9</sup>

In an attempt to standardize classifications and to develop an operational working definition of special education need, the new ISCED-97 (International Standard Classification of Education) definition has been adopted by OECD member countries. This definition uses a supply-side approach based on resources; i.e., the definition recognizes "those with SEN are defined by additional public and/or private resources provided to support their education."<sup>10</sup> Additional resources can be personnel (e.g., student/pupil ratios in classrooms or teacher training), material (e.g., curriculum adaptations), or financial (e.g., formulas that set aside money for SEN within the regular budget allocation). This resource approach to defining SEN brings together students with a wide variety of learning difficulties, and so OECD, based on perceived causes of educational failure, devised a tri-partite categorization system. This system is used in a growing number of countries in the North and South.

**ISCED-97 Definition of Special Needs Education and Special Education Needs**

Educational intervention and support designed to address SEN. The concept of SEN extends beyond those who may be included in handicapped categories to cover those who are failing in school for a wide variety of other reasons that are known likely to impede a child's optimal progress. Whether or not this more broadly defined group of children are in need of additional support depends on the extent to which school need to adapt their curriculum, teaching and organization and/or to provide additional human or material resources so as to stimulate efficient and effective learning for these pupils.

**Tri-partite Categorization system**

Category A: students whose disabilities have clear biological causes

Category B: students who are experiencing learning difficulties for no particular reason

Category C: students who have difficulties arising from disadvantages

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<sup>9</sup> For a detailed list of terms used to describe children with special education needs in selected countries, see *Annex 1: Classifications of Disability and Notes on Definitions*.

<sup>10</sup> OECD (2000) *Special Needs Education Statistics and Indicators*, p. 8.

<sup>10</sup> President's Commission on Excellence in Special Education (2002). *A New Era: Revitalizing Special Education for Children and Their Families*. Washington, D.C.: U.S. Department of Education. Available at: [www.ed.gov/inits/commissionsboards/whspeiaeducation/](http://www.ed.gov/inits/commissionsboards/whspeiaeducation/)

This tri-partite categorization system places students with different disabilities in the same category. This 'cross-categorical' approach represents a growing trend. For example, a recent US report of the *President's Commission on Excellence in Special Education* (2002) questions the "proliferation of categories" and "could not identify firm practical or scientific reasons supporting the current classification of disabilities in IDEA" (p. 22).<sup>11</sup> This report noted that 90% of all students served under IDEA included 'high-incidence' disabilities: i.e., those with specific learning disabilities, speech and language impairments, emotional disturbance and mild mental retardation. For these students, the Commission expressed concern that classification systems "waste valuable special education resources in determining which category a child fits into rather than providing the instructional interventions the child requires" (p. 22). The Commission further finds that early intervention focused on reading, coupled with classroom-based approaches involving positive discipline prevents many disabilities, results in improved academic achievement, significantly reducing the need to refer and identify students.<sup>12</sup> Based on these findings, the Commission recommends simplifying assessment and identification wherever possible, and orienting assessments towards provision of services.

The Commission's findings and recommendations, as well as the ISCED-97 definition, point to a growing realization that, for the majority of students, the environment plays a significant role in disabling these students. The new International Classification of Functioning and Disability (ICF) developed by the World Health Organization (WHO) supports this concept. Under concerted pressure from international disability rights organizations, WHO adopted this new classification system in 2001. The ICF replaces the ICIDH-2 and organizes disability along two dimensions: functioning and disability (including body functions/structures and activities/participation in society), and contextual factors (environmental and personal). This ICF definition shifts the focus from disability as an innate deficit to disability as constructed through the interaction between the individual and the environment. This conceptual model of disability encourages focus on kinds and levels of interventions appropriate to the disablement needs of individuals within specific contexts, and is consistent with the social model of disability that is upheld by disability rights organizations and many disabled people.<sup>13</sup> Ingstad (2001) reports that this ICF classification system was developed using a process of consensus involving both developed and developing countries. Ingstad argues that the ICF distinctions are particularly important in many developing countries, where personhood depends more on social identity and the fulfillment of family obligations than on individual ability.<sup>14</sup>

It is important to recognize the distinction between impairment and disablement. Disabled Persons International (1981) promotes the following distinction: "Impairment is the loss or limitation of physical, mental or sensory function on a long term or permanent basis. Disablement is the loss or limitation of opportunities to take part in the normal life of the community on an equal level with others due to physical and social barriers."<sup>15</sup> Specifically, the *social model of disablement* focuses on environment. The *medical model of disability* focuses on an individual who needs fixing—either by therapy, medicine, surgery or special treatment. To illustrate the importance of this distinction, a girl child with an impaired finger might be considered unmarriageable and education therefore unnecessary. On the other hand, a boy with severe multiple impairments might be offered comprehensive support services in school and technological communication aids that greatly minimize his functional impairment. Although this girl child's impairment is strictly minimal, the impact on life chances and opportunities is significant.

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<sup>12</sup> Reference is to the National Research Council (2002). Division of Behavioral and Social Sciences and Education. *Minority Students in Special and Gifted Education*. Washington, D.C.: National Academy Press.

<sup>13</sup> Complete classification information may be found from WHO, ICF [www.who.int/icf](http://www.who.int/icf). See also P. Dudzik & D. McLeod (2000). Including the Most Vulnerable: Social Funds and People with Disabilities. Social Protection Discussion Paper No. 0023, The World Bank, p. 23.

<sup>14</sup> B. Ingstad (2001). Disability in the Developing World. In *Handbook of Disability Studies*. G. Albrecht, K. Seelman & M. Bury (Eds). London: Sage Publications. Pp. 772-792.

<sup>15</sup> As reported in R. Rieser. (2000). History of our oppression. Why the social model in education is inclusive education. Paper presented at the International Special Education Congress. Manchester, England. July 23, 2000.

As a result, it should not be assumed that the severity of an impairment equates with severe functional limitation or disablement.

The distinction between impairment and disablement is also an important one for Inclusive Education. Focus on the environment means schools and teachers must accommodate to individual learners. A focus on individual students means that students must either be ‘cured’ or fit in if they do not want to be denied access to ‘regular’ education. Ballard, in *Inclusive Education: International Voices on Disability and Justice*, observed that: “There is general agreement from those who support and oppose Inclusive Education that there is nothing about special education that is not already part of practice in regular schools. Rather, special education is supported as a political strategy for ensuring that some students, those who fit predetermined categories, receive additional services and are not ignored or neglected” (p. 169).<sup>16</sup>

The terms ‘special education’ and students with ‘special education needs’ are widely used in the literature. However, as Ballard points out, ‘special’ makes an unnecessary distinction. Lynch (2001) supports this point and warns that the term SEN should be used with caution. Lynch argues that the term may perpetuate the binary divide between ‘ordinary’ and ‘special’ students and systems. Second, the label may present a barrier to the development of inclusive practice, and it is not very helpful in pinpointing the educational difficulties of the learner. Third, the label tends to put the burden on the learner and a focus on individual deficits, rather than the characteristics of the school and environment and therefore excuse schools from change.<sup>17</sup>

The wide variance in identification and classification of school-aged children and youth with disabilities and SEN makes it difficult to estimate potential demand (i.e., incidence and prevalence rates) for education to meet their needs.<sup>18</sup> However, a 1991 report prepared by the Special Rapporteur on Human Rights and Disability found that at least 1 out of 10 persons in the majority of countries has a physical, mental or sensory impairment. Because these persons reside within families, it is estimated that at least 25% of the entire population is affected by the presence of disability.<sup>19</sup> Of 500 million disabled people worldwide, 120-150 million are children. Eighty per-cent reside in developing countries. Further, there is every indication that this number is growing due to global conditions of increasing poverty, armed conflict, child labor practices, violence and abuse, and HIV/AIDS. For example, ILO reports that of the 250 million children working, more than two-thirds (69%) are affected by injury or illness. Almost a third of all people living with HIV/AIDS are between 15-24 years of age, or 10 million children and youth—2.2 million in sub-Saharan Africa.<sup>20</sup>

A significant number of impairments are caused by factors related to poverty: malnutrition is the leading cause, followed by infectious diseases, non-infectious diseases, and congenital diseases. In addition, an estimated 15.6% (78 million) impairments are caused by accidents/trauma/war.<sup>21</sup> In developing countries, 50% of all disabilities are acquired before the age of 15, so that the estimated prevalence of school-aged children and youth with disabilities may be higher than the incidence rate of 10%. When the number of children with “objective cause” disabilities is added to the total number of children identified with special education needs, OECD estimates that between 15-20% of all students will require special needs education during their primary and secondary school years.<sup>22</sup> These figures may also vary widely in urban and rural populations. Coleridge (1996) reports a probable urban bias in prevalence due to greater risk of injury, the attraction of possible services and institutions, better medical care, and the

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<sup>16</sup> Ballard, K. (ed.) (1999). *Inclusive Education: International Voices on Disability and Justice*. London: Falmer Press.

<sup>17</sup> J. Lynch (2001). *Inclusion in Education: The Participation of Disabled Learners*. France: UNESCO.

<sup>18</sup> For an estimate of the total population of disabled people by countries, see Metts (2000), pp.62-67.

<sup>19</sup> Reported in *It Is Our World Too! A Report on the Lives of Disabled Children*. Published by Disability Awareness in Action, 2001. London. Prepared by Gerison Lansdown.

<sup>20</sup> Lansdown, p. 9.

<sup>21</sup> Statistics derive from the World Summit on Social Development as reported in *It's Our World Too!* (2001).

<sup>22</sup> OECD 1999, p. 13 as reported in Dudzik, TOR 2003

possibility of begging. However, Coleridge points out that some rural areas may have higher than average prevalence rates, citing as an example some villages in Zaire where more than 30 per cent of the population may be affected by river blindness.<sup>23</sup> Finally, estimates of the percent of disabled children and youth who attend school in developing countries range from less than 1% (Salamanca Framework for Action, ¶10) to 5% (Habibi 1999).<sup>24</sup>

In short, significant numbers of disabled children and youth are largely excluded from educational opportunities for primary and secondary schooling. The usefulness of categorical classifications of disability is being questioned in terms of their cost-effectiveness and their ability to identify needed services. Environmental factors play a significant role in disabling the vast majority of students. Exclusion, poverty and disability are linked. Education is widely recognized as a means to develop human capital, to improve economic performance, and to enhance people's capabilities and choices so that exclusion from education can result in a staggering loss of freedom and productivity in the labor market.<sup>25</sup> The international community (at least at the policy level) has recognized education as a fundamental child right and has committed to a framework for action to address this right, and to redress exclusion as directed by EFA 2000.

In order to understand exclusion and strategies for working toward inclusion, it is necessary to examine research on policy and practice at the micro-level (schools and communities), at the meso-level (educational systems and external agency support services), and at the macro-level (national/international policy and national legislation). Having presented a background in terms of the complexity of the issues involving inclusive education, the next section reviews practice at the micro-level, where Inclusive Education initiatives and implementation originate. The first-wave of substantive reporting originated with countries of the North, so a brief review of lessons learned in terms of practice in these countries follows. This review is followed by a more substantive discussion of the second-wave of reporting on practice in countries of the South. For, as Stubbs (1996) and others report, in this second-wave, countries of the South have taken the best from international 'solutions' found in Western contexts, built on the strengths in indigenous practice, and produced culturally appropriate sustainable inclusive education programs.<sup>26</sup> Finally, Inclusive Education practice in all countries occurs within economic and political contexts underpinned by cultural values. The final sections of this review provide a substantive overview of SEN finance at the meso-level, and of national/international policy and legislation at the macro-level related to Inclusive Education.

[Author's note: The terms countries of the North and South, rather than the terms developed and developing countries are used in this review. This choice conforms to the trend in the literature. 'North' and 'South' in this review are used as shorthand to describe the rich, industrialized countries, and those countries that are still in the process of economic development. (Definition adopted from UNESCO Thematic Study, 2001: *Inclusion in Education: The Participation of Disabled Learners*.)]

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<sup>23</sup> P. Coleridge (1996). *Disability, Liberation, and Development*. Oxfam: UK & Ireland. P. 106.

<sup>24</sup> Habibi, 1999 as reported in Peters 2003, p. 12.

<sup>25</sup> For example, the 1993 *World Development Report* of The World Bank found that in 1990 the loss of productivity due to malnutrition alone was equal to 46 million years as reported in Rasheed, 1999. Metts (2000) reports the total annual value of GDP lost due to disability globally as equivalent to between 1.3 and 1.9 trillion US dollars. P. 71.

<sup>26</sup> S. Stubbs (1996). *Poverty and Membership of the Mainstream: Lessons learned from the South*. Published by EENET: [www.eenet.org.uk/theory\\_practice/poverty.shtml](http://www.eenet.org.uk/theory_practice/poverty.shtml)

## II. Inclusive Education Practice: Lessons from the North

### **Inclusion: A Whole-School Approach**

Inclusion should not be viewed as an add-on to a conventional school. It must be viewed as intrinsic to the mission, philosophy, values, practices and activities of the school....Full inclusion must be embedded deeply in the very foundation of the school, in its missions, its belief system, and its daily activities, rather than an appendage that is added on to a conventional school.

Henry M. Levin (1997)<sup>27</sup>

### **Introduction**

A plethora of research literature on best practice exists, emanating from Canada, the United States, Europe, and other OECD (Organization for Economic Cooperation and Development) Country studies. This section begins with a brief historical background followed by an overview of large-scale studies and reform movements at the micro-level of classroom and school practice. A detailed review of macro-level issues concerning legal and policy development in Inclusive Education is treated separately in Section V: Legal Issues. The final sub-section in this chapter discusses three special issues related to Inclusive Education Practice: Accountability for IE effectiveness, Parental Involvement and Gender Differences.

### **Background**

Provision of SEN services began with residential schools for blind and deaf students. First established in the eighteenth century in Europe, these schools grew rapidly during the 19<sup>th</sup> century. Special schools for those with mobility impairments came later around the turn of the 20<sup>th</sup> century. North America followed a similar route, although beginning later than in Europe. At the same time, those with intellectual impairments were largely institutionalized as uneducable in both Europe and North America. These beginnings of SEN provision in the North were driven by professionals who developed diagnoses, interventions and treatment focused on specific impairments. As a result, the medical model of disability became thoroughly accepted and entrenched. Charitable and religious organizations played a major role during these early years in the provision of services, leading to what became known as the 'charity' model of services; i.e., education of disabled children and youth was not viewed as a right, but as a charitable means of providing *for* them.

World War II and its aftermath witnessed the emergence of family, community and consumer models of service delivery for SEN students. The social model began to be developed and parents pressured for deinstitutionalization in both Europe (e.g., the concept of normalization promoted by Wolfensberger) and in North America (e.g. the landmark decision of PARC vs. the Board of Education in the US). A growing number of disabled people, parents and coalitions of advocates began to organize for political action to redress discrimination and inequities in society and in education. By the 1970s, the Independent Living Movement and principles of self-advocacy gathered strength. One result was the landmark US Education Act, PL-94-142. Passed in 1975, this act mandated access to education for students with all types and degrees of disability. PL94-142 underwent several amendments (every 5 years) and culminated in the 1997 amendments and a change of title: Individuals with Disabilities Education Act (IDEA). IDEA raised the level of expectations, requiring maximum access to the general education curriculum for students with disabilities and mandating new accountability measures to assure their progress and success. Unique to Europe, Italy's National Law 118 (1971) and National Law 517 (1977) established Inclusive Education as national policy. Other major disability rights laws in Canada, Britain (the Disability Discrimination Act of 1995) and the US (Americans with Disabilities Act of 1990)

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<sup>27</sup> H. Levin (1997). *Doing What Comes Naturally: Full Inclusion in Accelerated Schools*. In *Inclusion and School Reform: Transforming America's Classrooms*. D. K. Lipsky & A. Gartner (Eds). Baltimore: Paul H. Brookes Publishing Co. Pp. 389-400. Quote is from P. 390.

mandated an end to discrimination in all aspects of life and required the elimination of all types of barriers to participation in society. As a result, the end of the 20<sup>th</sup> century saw the establishment of a new era based on civil rights, social participation, and an emerging cross-disability perspective.

***Parallels with School Effectiveness Reform:*** At the same time that Inclusive Education was gaining adherents and legal/policy supports, a parallel growth of what has become known as the School Effectiveness movement/reform gained momentum beginning in the 1980s. At the opening of the 21<sup>st</sup> century, School Effectiveness reform, based on a market-driven approach to education has taken root in countries of the North. Inclusive Education, with its emphasis on equality and social capital benefits (in addition to excellence and academic achievement) has often seemed at odds with the School Effectiveness movement. For example, while it has been argued that School Effectiveness reform benefits all students, Slee and others (1998) assert that school effectiveness reform is excluding of children with special needs, “it is normative and regulatory (operating within narrow sets of performance indicators), it is bureaucratic and disempowering. It focuses exclusively on the processes and internal constructs of schooling, apparently disconnected from education’s social end—adulthood. School effectiveness seems to be neither interested nor very effective in preparing children for citizenship, parenthood or work (Ranson, 1997).”<sup>28</sup>

Some of the current research on Inclusive Education does indicate that at least some of the accountability policies of School Effectiveness are having an adverse effect on SEN students. (For evidence of these adverse effects, refer to “Section IV: Economic Issues” of this review.) Despite these concerns, Ferguson argues that, after years of research on Inclusive Education, “there is now growing certainty among some educators that inclusive reforms in special education must be pursued in terms of the general education restructuring and improvement” and “that unless this merging of efforts occurs, special education reforms will only achieve partial success at best and end up reinforcing and maintaining the very assumptions and practices that the reforms [in Inclusive Education] seek to change.”<sup>29</sup>

Within the mainstream literature on change and educational reform, Michael Fullan’s work reinforces the parallels between general education and Inclusive Education reform. According to Fullan (1991), three core dimensions constitute educational change: beliefs, methods, and material resources. These three dimensions exist in a dynamic interrelationship. Addressing Inclusive Education within the overall context of school reform, Fullan states:

Mainstreaming is one of the more complex changes on the current educational scene, and as such it highlights the dimensions of change and the magnitude of the task in bringing about major educational reform—valuing new beliefs; cognitively understanding the interrelationship between the philosophical principles and concrete diagnosis and treatment; changing the roles and role relationships between regular classroom teachers and special education teachers, and between school personnel and community members and professionals outside the school.<sup>30</sup>

Supporting this notion of a merger, Lynch (2001) reports that many world organizations (e.g., Save the Children and UNICEF) and donor agencies such as the World Bank have begun to build on the work of effective schools, “combining it with the results of work and research from the developing world to identify policies, approaches and inputs which can optimize learning opportunities for all, based on a participatory assessment of local needs.”<sup>31</sup> The Salamanca Framework for Action also calls for a “clear and forceful policy on inclusion” and asserts that most of the required changes to meet the needs of SEN

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<sup>28</sup> R. Slee & G. Weiner (1998). *School Effectiveness for Whom? Challenges to the School Effectiveness and School Improvement Movements*. London: Falmer Press. P. 5

<sup>29</sup> D. L. Ferguson (1998). *Changing Tactics: Embedding Inclusion Reforms within General Education Restructuring Efforts*. In *Inclusive Schooling: National and International Perspectives*. S. J. Vitello & D. E. Mithaug (Eds). New Jersey: Lawrence Erlbaum Associates, Publishers. Pp. 35-53. Quote is from Pp. 35-36.

<sup>30</sup> M. G. Fullan (1991). *The New Meaning of Educational Change*. New York: Teachers College Press. Pp. 41-42.

<sup>31</sup> J. Lynch (2001). P. 32

students “are part of a wider reform of education needed to improve its quality and relevance and to promote higher levels of learning achievement by all students.”<sup>32</sup> The Salamanca Framework also underscores that the World Declaration on Education for All calls for child-centered approaches to learning, and flexible adaptive systems capable of serving a wide range of students with diverse needs—all of which are compatible with recognized Inclusive Education best practices. This historical background and analysis of current reform movements provide a critical context to review Inclusive Education best practice in countries of the North.

### **Best Practice in the United States and Canada**

*In Canada*, more than two decades of Inclusive Education practice have significantly impacted countries of the North. Marsha Forest is one of the recognized pioneers of Inclusive Education in North America. She began her career as a special consultant at the Montreal Oral School for the Deaf in 1968. After years of struggling to make Inclusive Education a reality in Canadian Schools, she orchestrated a confrontation with school officials who had refused admittance of students with mental handicaps to Ontario schools. Several Ontario Schools eventually became models of Inclusive Education. As demonstration schools, they hosted visitors from all over North America and European countries. At the center of this inclusive vision was Marsha’s belief in children and their capacities. This belief is manifested in several widely adopted best practices that began in Ontario schools: Person Centered Planning, Making Action Plans (MAPS), Circles of Friends, and PATH (Planning Alternative Tomorrow’s with Hope)<sup>33</sup>. These educational programs are powerful tools for building connections between schools, parents and communities, and for solving complex individual, family, and systems issues that may act as barriers to Inclusive Education. Evidence of the impact of the pioneering work of Marsha and the Ontario Schools abounds in the literature.<sup>34</sup> In 1989, Marsha and her husband, Jack Pearpoint, established the Centre for Integrated Education and Community in Toronto, Canada. This center continues to initiate and support path-breaking activities to advance inclusion in education and communities.<sup>35</sup>

In addition to Ontario, a noteworthy system-wide approach to Inclusive Education exists in the province of New Brunswick, Canada. Inclusive Education became official policy in New Brunswick as early as 1968, and reinforced in 1985 by the Act to Amend the Schools Act. Known as Bill 85, every school in the province is required to provide Inclusive Education. Italy is the only other OECD member that matches this level of official Inclusive Education law/policy. In New Brunswick, as in Italy, virtually all students are educated in ordinary classrooms, with specialized support as needed based on a student’s Individualized Education Plan. Key features of best practice in New Brunswick schools include: the belief that all children can learn if they are given appropriate learning opportunities, planning individualized learning, developing support teams, promoting social skills and responsibilities among the children, assessing children’s performance, planning for transition from one stage of education to the next, working in partnership with parents and other members of the community, implementing staff development plans, and being accountable (New Brunswick Department of Education 1994).<sup>36</sup> One district in New Brunswick ranked highest in standardized English and Math examinations for the years reported and had one of the highest graduation rates in Canada (OECD, 1999: 98).

External factors reported to contribute significantly to sustained success in New Brunswick Schools included (OECD, 1999: 109-110):

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<sup>32</sup> Salamanca Framework for Action. ¶26 & 27.

<sup>33</sup> An excellent source book explaining these programs and other best practices is *Inclusion: A Guide for Educators* (1996). S. Stainback & W. Stainback (Eds). Baltimore: Paul H. Brookes Publishing Co.

<sup>34</sup> For example, *The Making of the Inclusive School* (Thomas, Walker & Webb, 1998) describes a comprehensive implementation of IE in several cluster schools in the UK that were developed with the technical support of the Marsha Forest Centre in Toronto.

<sup>35</sup> The Centre has been renamed the Marsha Forest Centre in her memory after her death in 2000. The Centre maintains a website, Inclusion Press, and Inclusion Network at [www.inclusion.com](http://www.inclusion.com)

<sup>36</sup> OECD (1999). *Inclusive Education at Work: Students with Disabilities in Mainstream Schools*. Paris: OECD. p. 89.

- contribution by the district support services team to the education of children generally, not just to that of children with special needs;
- provision by the district students support services team of continuing in-service training on a regular basis for the methods and resource teachers employed as special education consultants in the schools, enabling them to develop and sustain the expertise and credibility required;
- regular in-service training for class teachers and teachers' assistants in the teaching methods needed;
- involvement by the school principals of the methods and resource teachers in regular discussion concerning issues of school management generally, not just in relation to special needs;
- parent involvement as active participants in the education process, not just as its clients.

*In the United States*, Inclusive Education programs have grown exponentially since the passage of PL94-142 in 1975. Lipsky and Gartner (1997) report that between 1994-1995 the number of school districts reporting Inclusive education programs in the US tripled.<sup>37</sup> A 1994 report of National Center on Educational Restructuring and Inclusion (NCERI) documented inclusion programs in every state, at all grade levels, involving students across the entire range of disabilities. Also in 1994, a Working Forum on Inclusive Schools convened by 10 US organizations at the national level, identified the following best practice characteristics for Inclusive Education:<sup>38</sup>

***A Sense of Community:*** philosophy & vision that all children belong & can learn

***Leadership:*** School administrators play a critical role in implementation

***High Standards:*** high expectations for all children appropriate to their needs

***Collaboration and Cooperation:*** support and co-operative learning

***Changing Roles and Responsibilities:*** of all staff

***Array of Services:*** e.g., health, mental health and social services

***Partnership with Parents:*** equal partners in educating children

***Flexible Learning Environments:*** pacing, timing, and location

***Strategies Based on Research:*** best-practice strategies for teaching and learning

***New Forms of Accountability:*** standardized tests & multiple sources

***Access:*** physical environment and technology

***Continuing Professional Development:*** on-going

From this work, and their studies of Inclusive Education programs in the US, NCERI developed the following institutional definition of Inclusive Education:

#### **NCERI Institutional Definition of an Inclusive School**

A diverse problem-solving organization with a common mission that emphasizes learning for all students. It employs and supports teachers and staff who are committed to working together to create and maintain a climate conducive to learning. The responsibility for all students is shared. An effective, inclusive school acknowledges that such a commitment requires administrative leadership, on-going technical assistance, and long-term professional development. Within inclusive schools there is a shared responsibility for any problem or any success for students in the schools. (*Creating Schools*, 1995. p. vii.)

In the United States, two specific reform models are worth mentioning, as they have received widespread acclaim for successes and considerable attention in the popular press and news media. Both reforms involve large networks of schools attempting comprehensive changes in all aspects of school organization and instruction. Both reforms report low costs (\$US30 per student in the second reform). The first, Robert Slavin's Success For All school reform, begins with two essential principles: prevention and

<sup>37</sup> D. K. Lipsky & A. Gardner (1997). *Inclusion and School Reform: Transforming America's Classrooms*. Paul Brookes Publishing Co: Baltimore. P. 100.

<sup>2</sup> Lipsky & Gartner (1997). Pp. 102-103.

immediate intensive intervention in 1<sup>st</sup>, 2<sup>nd</sup>, and 3<sup>rd</sup> grades of primary school. Critical components of the reform include: reading tutors (one-on-one instruction); heterogeneous age-grouped 90 minute daily reading group instruction; a family support team that provides parenting education to support children, and continuous/intensive teacher training. Every effort is made to address all students' learning problems within the context of the regular classroom. SEN students are fully integrated with tutoring support. Students with more serious disabilities receive in-class assistance from aides (trained para-professionals) and special education teachers. Research results report strongly positive effects in terms of grade-level growth in academic achievement.<sup>39</sup>

The second reform program, Accelerated Schools Project (ASP), has been adopted by over 1000 primary and "middle" schools in 41 states since its inception in 1986. Any school (public or private) can initiate requests to become an Accelerated School. Schools that adopt the Accelerated Schools process of whole-school reform commit to treating all students as if they are gifted and talented. Learning is accelerated and enriched, rather than remediated and watered-down. The hallmark of Accelerated Schools is high expectations, an enriched curriculum that accelerates learning, and high level of parental involvement. The core teaching strategy is "powerful learning" which is defined as "incorporating changes in school organization, climate, curriculum and instructional strategies to build on strengths of students, staff and community to create optimal learning."<sup>40</sup> Many reforms in the US provide packaged curriculum guides and piecemeal reform focused on teaching and learning in classrooms. The ASP is a whole school reform model that builds on capacities of teachers and schools through generalized training in a research-based problem-solving process. Schools develop their own curricula suited to the specific needs of their own learners. Used extensively in schools with large numbers of SEN and "at-risk" students (many of whom come from families at poverty levels), evaluations of the program have shown substantial gains in student achievement, increased attendance, reductions in suspensions, and few grade repetitions.<sup>41</sup>

For most Inclusive Education programs in the United States, research and evaluation on outcomes is largely based on case studies, and qualitative data. However, a few large-scale quantitative studies have been undertaken. An early meta-analysis of 50 studies (Weiner, 1985) compared the academic performance of mainstreamed and segregated students with mild handicapping conditions. The mean academic performance of the integrated groups was in the 80<sup>th</sup> percentile, while segregated students scored in the 50<sup>th</sup> percentile.<sup>42</sup> Baker, Wang and Walberg (1994) conducted meta-analysis of Inclusive Education studies that generated a common measure of effect size. This measure demonstrated a small to moderate beneficial effect of Inclusive Education on academic and social outcomes of SEN students. More recently, several large-scale longitudinal studies of Kentucky's statewide high-stakes testing involving students with disabilities in inclusive settings have been reported in the literature. Results have been mixed. However, in one of these studies (Koretz & Hamilton, 2000) reported that students with learning disabilities who received test accommodations scored well above the average for non-disabled students in every subject except math.<sup>43</sup> Another recent large-scale longitudinal study of Chicago schools measured the performance of students with disabilities on standardized achievement tests after being placed in special education classrooms. Students did not do better, and tended to grow further and further apart, in terms of achievement from comparable students not placed in special education.<sup>44</sup>

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<sup>39</sup> R.E. Slavin, in Lipsky & Gartner (1997), p. 382.

<sup>40</sup> H. M. Levin in Lipsky & Gartner (1997), "Doing what comes naturally: Inclusive Education in Accelerated Schools." p. 395.

<sup>41</sup> Information on ASP schools and projects may be obtained at [www.acceleratedschools.net](http://www.acceleratedschools.net).

<sup>42</sup> R. Weiner (1985). *Impact on the Schools*. Capitol Publications.

<sup>43</sup> D. Koretz & L. Hamilton (2000). Assessment of Students with Disabilities in Kentucky: Inclusion, Student Performance, and Validity. *Educational Evaluation and Policy Analysis*. Vol. 22, No. 3, pp. 255-272.

<sup>44</sup> A. J. Reynolds, B. Wolfe (1999) Special Education and School Achievement: An Exploratory Analysis with a Central-City Sample. *Educational Evaluation and Policy Analysis*. Vol. 21, No. 3., pp. 249-269.

## **Best Practice in Europe and other OECD Countries**

Turning to European and OECD studies of Inclusive Education, several multi-country studies were conducted between 1994 and 2003. The following subsections highlight some of the major findings from three major studies in terms of best practice, beginning with the earliest studies, and ending with the most recent.

### **(a) *The Integration of Disabled Children into Mainstream Education: Ambitions, Theories and Practices*. OECD, Paris, 1994.**

This survey of twenty-three member countries was conducted to identify common areas of success and difficulty experienced in integrating disabled pupils into ordinary schools. Findings of the study focus on: (1) placement decisions, (2) parental choice issues, (3) equality of access and integration, (4) forms and models of integration, and (5) teacher training and staff support.

In terms of placement, a continuum of placements is typical of member countries, from least integrated (special schools) to most integrated (ordinary class placement with support). Denmark is notable for its 5 principles for making placement decisions. Different kinds of provision for SEN students are guided by the principles of: proximity, minimum intervention, integration, effectiveness and motivation (p. 23). Various factors influence placement in all of the countries studied: (i) regulations (e.g., Sweden places deaf and severely mentally retarded students in special schools as official policy, whereas national policy in Italy assumes all children will be integrated); (ii) teacher willingness to accept a child; (iii) availability of resources; and (iv) family social status.

Once placement has been determined, most countries use Individualized Education Program (IEP) Plans to determine academic needs of SEN students. [IEPs are variously called “targeted action programs (Scandinavian countries), “didactic programming” (Italy), personalized intervention programs (Canada)]. In developing IEPs, a positive strength-based approach and needs-based assessments are generally used to determine appropriate curriculum accommodations and adaptations. Effective pedagogical practices such as cooperative learning, peer tutoring, heterogeneous grouping are widely recognized as the most effective.

Finally, in terms of teacher training, a comprehensive approach characterizes best practice: school-based in-services combined with “intentional training” (individualized in-class support of teachers), and university courses. One promising trend reported is the conversion of special schools into resource and training centers, where staff provide outreach support to schools. In France, “zones d’éducation prioritaires” is a well-known example of increased resources to population areas with large numbers of particularly disadvantaged students. Overall, training is a high priority, and the report recommends that the focus should be on problem-solving approaches, as well as training in collaboration and negotiation skills, rather than in specific disability knowledge areas. Member countries also reported higher levels of success in primary versus secondary schooling.

### **(b) *Inclusive Education at Work: Students with Disabilities in Mainstream Schools*. OECD, Paris. 1999.**

OECD carried out this study between 1995 and 1998 in eight countries from three regions (North America, Europe, and the Pacific). A major finding of this study: “From organizational, curriculum and pedagogical perspectives, given certain safeguards, there is no reason to maintain generally segregated provision for disabled students in public education systems” (page 14). In fact, changes in pedagogy and curriculum development were found to benefit all students. The extensive research analyses provided a “substantial if not overwhelming case to support the full integration of disabled children into mainstream schools” (page 22). Also, evidence suggests that Inclusive Education improves performance of non-SEN students, in part because the increased attention to pedagogy and

curriculum adaptation generalizes teaching skills to all students.<sup>45</sup> However, an important caveat to these findings is that close attention has to be given to policy frameworks, parental choice, organization and funding of schools, and teacher/student/family support systems in order for Inclusive Education programming to be effective.

Most countries still feel the need to maintain some form of segregated provision—either special classes in regular schools or special schools. (Most frequently cited as needing segregated placement were students with emotional and behavior problems—as schools are reporting a growing number of problems in this area.) Further, in most countries, Inclusive Education programming is limited, but there is a definite trend toward increased Inclusive Education.

Several of the top-priority critical factors cited as promoting best practice in Inclusive Education are briefly described below:

- (i) **Teacher training** is accorded a high priority. Content should be practical (classroom based), focus on teacher attitudes and changes in roles. Good practice is only sustainable with on-going training (p. 37). Specific skills for teacher training of specialists include:
- working as the special education co-coordinator
  - team-teaching
  - developing mutual support between teachers and learning to develop effective collaboration through meetings and a problem-solving approach
  - the pedagogies of curriculum differentiation
  - the development of individual education programs
  - the monitoring of progress

With these skills, specialist teachers work with general education teachers in classrooms to serve as a continuing source of development for general education teachers, a practice known as the “enskillings” of teachers. At their best, these support teachers are fully integrated within the school as a whole.

Further, education policies affect training. Policies that support effective training include those that support coordination of services, and multi-disciplinary team planning. Multi-professional training for a coordinated system of services includes specific skills (p. 311):

- knowledge of concepts of inclusion and service coordination at all levels (policy, program, and practice)
- knowledge of the roles of the various disciplines who serve students with SEN
- preparation for functioning as an effective team member (at the service as well as the planning level)
- preparation for co-coordinating services for families

(ii) **Whole-school approaches**

School management personnel need to be closely involved in innovations, especially since they are accountable for school performance as a whole. “Assertive discipline” programs (also known as Positive Behavior Supports in the US) are whole-school approaches to address the increasing violence experienced in schools—an area of “great concern” to member countries. Further, a within-school support strategy is recommended over external expertise—based on the philosophy that “If a school can handle the sparks, the fire brigade is not required” (p. 39). Characteristics of a within-school support approach include (page 47):

- additional flexibility in the establishment of class sizes and in their composition
- immediate support for regular class teachers from specialist teachers within the school and from assistants
- the reduction of teacher/student and adult/student ratios

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<sup>45</sup> This OECD report notes, that benefits to non-SEN students is an important indicator, but needs more investigation to link costs with outcomes (page 49).

- increased skills in curriculum differentiation and the development of more flexible pedagogies through the shared preparation of assessments and writing IEP plans.
- corporate curriculum development, including the making of curriculum materials to meet SEN students' needs.

(iii) **Curriculum development**

The trend is toward outcome-based curriculum at the primary level and the offering of 'practicals' at the secondary level. [In the US, this offering is referred to as work-based learning, and has been found to be the number one indicator of post-school success for SEN students.]

(c) **Special Needs Education In Europe.** European Agency for Development in Special Needs Education, and EURYDICE. Brussels, 2003.

This 30-country study focused on five areas of Inclusive Education: (i) inclusive education policies and practice; (ii) funding of special needs education; (iii) teachers and special needs education; (iv) Information and Communication Technology in Special Needs Education; and (v) Early Intervention. In terms of Inclusive Education practices, the findings of this study reinforce findings of earlier OECD studies in some areas. Specifically, a policy towards Inclusive Education is a general trend. However, special schools still enroll between 1-6% of all pupils in segregated schools and classes. A high correlation exists between the percentage of pupils in segregated educational provision and population density. There appear to be clear disadvantages to segregation in countries with low population density related to cost-effectiveness factors.

Major trends in best-practice include:

- (i) **transforming special schools into resource centers** continues to be a common trend. These centers typically provide the following cost-effective supports:
  - provide training and courses for teachers and other professionals
  - develop and disseminate materials and methods
  - support mainstream schools and parents
  - provide short-term or part-time help for individual students
  - support students in entering the labor market
- (ii) **Individualized Education Plans** continue to play a major role in programming to determine the degree and type of adaptations needed and to evaluate students' progress

A significant portion of this report focuses on **barriers and challenges** experienced by European countries as follows:

- (i) **Secondary level education:** countries report "serious problems" at this level as compared to primary schooling. Countries attribute these problems to insufficient teacher training, less positive teacher attitudes, an increasing achievement gap between SEN students and their peers, increased academic subject specialization and different school organization.
- (ii) **Role of Parents:** most countries reported positive attitudes toward Inclusive Education on the part of parents, and that parental pressure towards Inclusive Education is increasing. However, those families that have students with severe disabilities sometimes prefer segregated settings. Also, the trend toward decentralization has led to increased parental power over decision-making.
- (iii) **Funding:** is cited as a major barrier of Inclusive Education and training. Countries are undergoing major funding reforms. (See the section on SEN Funding of this report for further discussion of this issue.)
- (iv) **Legislation:** Progress has been achieved, but problems still remain. (See the section on SEN Legislation, 'Section V: Legal Issues' of this review for further discussion of this issue.)

- (v) **Decentralization:** There is a clear and widespread trend toward decentralization that plays a key role in Inclusive Education. The shift of resources and decision-making to local authority is seen to increase flexibility, and allow better adaptation to local circumstances. However, disadvantages include wide variations in quality and level of service.

### **Special Issues across all studies in countries of the North: Accountability**

The first major issue that is a recurring theme across all major studies is that of accountability issues and challenges. Countries of the North are experiencing an increasing emphasis on educational accountability fuelled by public pressure, lower than expected student achievement, and scarce resources. The shift in focus has moved from access and quality issues to outcomes. McLaughlin and Rouse (2000)<sup>46</sup> present the most comprehensive treatment of this issue. In many countries, new standards-based curricula and new laws requiring improved achievement outcomes on standards-based tests are being used as measures of school performance. In the UK, “league tables” are published, and in the US, No Child Left Behind legislation (2002) mandates severe economic sanctions on schools that are “failing” to perform on these measures. These policies and legislation exert enormous pressures on schools, with adverse effects on SEN students. Specifically, reports indicate that these policies have led to a reluctance to accept SEN students who may depress test scores.<sup>47</sup> Also, schools are tempted to omit children with learning difficulties from testing programs. Schools may also be encouraged to expel students whom they find difficult to teach (OECD, 1999, p. 34).

EURYDICE also reports the trend toward accountability as having an adverse effect on Inclusive Education and SEN students. For example, their 2003 report notes a recent slight increase in segregated placements. This report also emphasizes a general need in all European countries for better monitoring and evaluation procedures. Complicating evaluation efforts, however, is the fact that development towards Inclusive Education requires reduction of labeling and assessment procedures.

In response to the recognized need for systematic evaluation of Inclusive Education Programs, the Centre for Studies on Inclusive Education (CSIE) in the UK, developed, piloted and further refined an *Index for Inclusive Schooling*. The Index “takes the social model of disability as its starting point, builds on good practice, and then organizes the *Index* work around a cycle of activities which guide schools through the stages of preparation, investigation, development and review.”<sup>48</sup> The *Index* provides specific detailed indicators of success in five areas: organization, communication, classroom experiences, social climate and relationships. One set of indicators for the dimension of classroom experiences (as reported in Sebba, Thurlow & Goertz 2000) are detailed below:

#### **Index for Inclusive Schooling: draft indicators for the dimension of classroom experience**

- 3.1 Pupils are entitled to take part in all subjects and activities.
- 3.2 Teaching and learning are planned with all pupils in mind.
- 3.3 The curriculum develops understanding and respect for differences.
- 3.4 During lessons all pupils participate.
- 3.5 A variety of teaching styles and strategies is used.
- 3.6 Pupils experience success in their learning.
- 3.7 The curriculum seeks to develop understanding of the different cultures in society.
- 3.8 Pupils take part in the assessment and accreditation systems.
- 3.9 Difficulties in learning are seen as opportunities for the development of practice.

<sup>46</sup> M. McLaughlin & M. Rouse (2000) *Special Education and School Reform in the United States and Britain*. Routledge: London & New York.

<sup>47</sup> There is some evidence however, that Inclusive Education can raise examination results for all students. See J. Sebba and M. Ainscow (1996). International developments in inclusive schooling: mapping the issues. *Cambridge Journal of Education*, 26: 5-18.

<sup>48</sup> Centre for Studies on Inclusive Education (2003). *Index for inclusion: developing learning and participation in schools*. CSIE web-site. <http://inclusion.uwe.ac.uk/csie/indexlaunch.htm> P. 1

Developed by Booth and Ainscow, the Index draws from work in Australia and the US and has been widely touted as an exciting new development in evaluation.<sup>49</sup>

### **Special Issues across all studies in countries of the North: Parental Involvement**

One recurring theme in the literature on Inclusive Education in the North highlights the importance of parental involvement in the education of their children. Most countries of the North have mandated by law, some form of parental participation in decision-making for SEN services involving their children. However, schools still struggle to include parents as partners in Inclusive Education. The issues appear to be complex. For example, some research seems to indicate that level of parental involvement is class and/or race based. Specifically, parents from diverse linguistic and cultural backgrounds “tend not to participate in or challenge educational decisions pertaining to their children because they feel disengaged and powerless when interacting with school personnel.”<sup>50</sup> Others indicate that the professional bureaucracy of schools carries built in barriers that de facto, exclude parents from meaningful participation.<sup>51</sup> On the other hand, parents who are motivated to get involved, tend to do so based on dissatisfaction with the school system and to come from majority (white) middle-class or upper class backgrounds. Schools often view these parents as adversaries and tend to blame parents for a student’s learning and behavior problems (Soodak, 1998).

The literature on Inclusive Education in the North highlights the importance of parental involvement and suggests several key strategies for best practice.<sup>52</sup> However, there are few systematic models of best practice that would assist schools.<sup>53</sup> The literature is clear, however, that parents are primary stakeholders in the success of Inclusive Education and that more attention needs to be paid to their perspectives, and a commitment made to capitalize on their expertise and to include them in all aspects of inclusive schooling.

### **Special Issues across all studies in countries of the North: Gender Differences**

OECD 2000 (*Special Needs Education Statistics and Indicators*) reports a consistent gender effect in SEN. An approximate 60:40 ratio of males to females appeared across all cross-national categories in special education systems. The report concludes, “This robust finding is not easy to interpret, but its ubiquity makes it tempting to suggest that it reflects a systematic difference in the extent to which males and females are perceived to have special education needs.” (OECD 2000, p. 102.) This consistent gender difference raises important policy issues related to identification and treatment of girls and boys. For a fuller discussion of these issues, see Evans (2000).<sup>54</sup>

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<sup>49</sup> Sebba, J., Thurlow, M. & M. Goertz (2000) Educational accountability and students with disabilities in the United States and in England and Wales. In *Special Education and School Reform in the United States and Britain*. McLaughlin & Rouse (Eds). London: Routledge. P. 117.

<sup>50</sup> L. C. Soodak (1998). Parents and Inclusive Schooling: Advocating for and Participating in the Reform of Special Education. In *Inclusive Schools: National and International Perspectives*. S. J. Vitello & D. E. Mithaug (Eds). New Jersey: Lawrence Erlbaum Associates, Inc. Pp. 113—131. Quote is from page 128.

<sup>51</sup> L. Ware (1999). My Kid and Kids Kinda Like Him. In *Inclusive Education: International Voices on Disability and Justice*. K. Ballard (Ed). London: Falmer Press. Pp. 43-66.

<sup>52</sup> OECD (1995) *Integrating Students with Special Needs into Mainstream Schools*. P. 198.

<sup>53</sup> Notable exceptions are the Accelerated School Project, where parents are central to development. Also, COACH (Choosing Options and Accommodations for Children) is a model of parent and student involvement in decision-making that has been used with success in developing educational plans for deaf-blind students and other students with severe multiple impairments. [See M. Giangreco (1996) Curriculum Planning for Students with Disabilities in General Education Classrooms. In Stainback & Stainback (Eds). *Inclusion: A Guide for Educators*. Pp. 237-254.

<sup>54</sup> P. Evans (2000). *Developing Equity Indicators based on Additional Resources supplied for Disabled and disadvantages Students*. OECD. Paris.

## **Summary**

Large-scale cross-national studies in countries of the North provide extensive information on best practice for Inclusive Education. A high priority involves teacher training, perhaps not surprisingly, due to the fact that personnel resources constitute approximately 80% of all school expenditures. All of the studies cited recommend that teacher training focus on enskilling classroom teachers in areas of pedagogy, curriculum development and adaptation. Training should be intentional and classroom-based, intensive, and on-going in order to promote sustainable effective practice. Second in priority is school-as-a-whole reform to support classroom practice. Important factors in whole-school reform include involved leadership, co-ordination of services, multi-disciplinary planning, parental involvement in decision-making, and in-school support systems to build capacity.

Although a definite trend toward inclusive practice and increase in inclusive education programming is evident in all countries of the North, considerable variation exists, most notably in the areas of classification and placement decisions. In addition, all countries face several challenges. The most significant of these are meeting the needs of SEN students in secondary schools, funding, and resource constraints. Special issues of accountability are exerting enormous pressures on schools to document effectiveness in terms of outcomes. This emphasis on accountability represents a significant shift from issues of access and quality of services. Systems of evaluation and documentation of effectiveness in terms of outcomes are lacking and need attention. While the studies provide some evidence of positive Inclusive Education effects, gaps in the research are most noticeable in this area. Finally, significant gender differences exist that reveal a bias toward boys were noted as a potentially significant area of concern that was largely omitted in the studies.

These lessons from the North constitute a first-wave of Inclusive Education reform in terms of practice. The next section analyzes lessons from the South, the second wave of reform.

### III: Inclusive Education Practice: Lessons from the South

Inclusion is a dynamic process of participation of people within a net of relationships. This process legitimizes people's interactions within social groups. Inclusion implies reciprocity. Thus, the perspective regarding special needs education is changing into a more democratic one; one that implies that special needs education is to be particularly of regular and universal public education.

**Secretary for Special Needs Education, Brazil Ministry of Education<sup>55</sup>**

#### **Introduction**

Rather than provide a list of “indicators” for effective Inclusive Education, this section begins with a composite success story in an attempt to capture Inclusive Education as a dynamic process. Effectiveness indicators predominate in the literature from Countries of the North. However, indicators do little to promote an understanding of development and treat Inclusive Education as if it were an event. The composite below includes commonalities across countries as well as strategies unique to particular programs that proved particularly successful. Although the composite draws from best practice in the South, it should not be construed of as an ideal model of Inclusive Education. This story is also not meant to be exhaustive, but illustrative of a range of possibilities. Local contexts-- including cultural sensitivities, specific strengths, identified needs and priorities-- will necessarily mediate decision-making regarding different aspects of Inclusive Education. This composite is based on a review UNESCO's *Inclusive Education and Community Support Programs, Phase II*, which was implemented from 1998-2001. The purpose of UNESCO's program was to implement Inclusive Education pilot projects in 12 countries with the ultimate goal of diffusion at national levels. These countries were selected as fertile ground for promising practice and then invited to participate.<sup>56</sup> Of the 12 countries initiating pilot projects, four were particularly successful: the ‘Fast-track’ countries of Ghana, India, Vietnam and Yemen. Much of the following composite is drawn from these four countries' experiences.

This composite story of the fictitious “Southern Hemisphere School System” provides a background for the following sections, which unpack the experiences in terms of specific issues, contexts, and trends.

#### **Inclusive Education: The Experience of “Southern Hemisphere School System”**

SH has an established national law mandating Inclusive Education as a right. The Ministry of Education has set a policy agenda with clear priorities aimed at promoting Inclusive Education for all those who have been traditionally excluded (e.g., disabled children) and for those with particular disadvantages; i.e., refugee children, working children and girls. The international donor agency considered these conditions as an important but not sufficient pre-requisite for initiating informal and then formal meetings with the Ministry of Education with respect to lending support to Inclusive Education initiatives. Once formal negotiations were completed, a meeting was held at the national level. This meeting included representative stakeholders whose support would be needed to ensure success of the initiative. Stakeholders included personnel from the Ministries of Education (both special and general education divisions) Health and Social Welfare; representatives of elected community officials; NGOs with a history of successful involvement in non-formal inclusive programs; DPO representatives; personnel from university teacher training programs; and union representatives. The meeting took place over three days and had three purposes: 1) to introduce/discuss the concepts of Inclusive Education; (2) to raise awareness and to share expertise regarding the issues involved; and (3) to establish a multi-sector commitment to undertaking the initiative.

Subsequently, a lead administrative unit was selected and agreed upon and a coordinator appointed. Several criteria were considered for the lead agency, including level of commitment, prior experience, institutional capacity, and established positive relations with schools. This lead agency's first task was to form a representative

<sup>55</sup> UNESCO (2001). *Inclusive Schools & Community Support Programs. Phase Two*. Paris: Author. P. 76.

<sup>56</sup> The twelve countries in UNESCO's Inclusive Schools and Community Support Programmes Phase II are: Cameroon, Dominican Republic, Egypt, Ghana, India, Madagascar, Mauritius, Nicaragua, Paraguay, South Africa, Vietnam, Yemen.

coordinating-committee, which would develop an action plan, including clear responsibilities and timetables for activities. The action plan called for selection of a geographical region for Inclusive Education initiatives. Selection was based on expert knowledge, priorities, relative needs, and other contextual factors. Regional authorities were approached, and local support teams formed composed of NGOs working in the area, community leaders, parent and teacher associations, and other agencies that provided support services relevant to the project. Parent representatives included those who had children with disabilities, those who did not, and parents/advocates of other disadvantaged children. This local support team went through a similar orientation process that had been conducted at the national level. After orientation, this local support team undertook a selection process for schools (3 minimum-15 maximum). The selection process included site visits and a feasibility study of school demographics and characteristics, as well as demand for Inclusive Education.

In selecting schools, the team was especially interested in considering individual school's and community's strengths and prior experiences. The team decided on 6 schools in close proximity to each other that had all been collaborating with a CBR program to develop inclusive programming. Three were pre-primary schools, and three were primary schools. This choice had the advantages of building on experience, encouraging collaboration through proximity, and also providing support across the continuum of school programs.

Once schools were selected and their participation invited, a series of workshops were developed through a joint working group of the local support team, school personnel (including the Principal and/or Head Teachers), parent groups, and student councils. Sensitive technical expertise and support from the donor agency facilitated the process throughout. Workshops were held at each school and began with the orientation format similar to those at regional and national levels. Once commitment to the project was established, subsequent workshops focused on specific strategies for teachers, with special attention to strategies for teaching large class sizes of diverse students. All of the workshops were structured to be interactive and to promote problem-solving, creative thinking and collaboration. People with disabilities were included in the workshops as part of the problem-solving process.

In all of the workshops, teachers were provided ample opportunities to relate challenges, to express their concerns, and to practice strategies through hands-on experiential learning activities. The UNESCO Teacher Resource Guide was introduced and critically evaluated by participants for adaptations needed to fit the needs of their own classrooms. One of the workshops specifically focused on assessment strategies, curriculum-based testing, and overall program evaluation procedures. Teachers also visited each other's classrooms in the participating schools. They chose representatives from each of the schools to attend a donor-sponsored regional seminar to gain further expertise and to share knowledge. As a part of the regional seminar, the donor agency sponsored study tours of established Inclusive Education classrooms and schools. The participants returned and shared their experiences at the school level.

Some teachers were initially resistant, seeing the initiative as an extra burden in already overloaded work conditions. But as work progressed, enthusiasm built. They came together in weekly or bi-monthly meetings to share their successes, and soon found that their training was facilitating learning for all students. These meetings also provided opportunities for them to problem-solve about barriers they were encountering. In addition, they were provided on-going support by visits from the local support team. Team members met with individual teachers to talk about their concerns, as well as in groups. In some ways, they had been developing relevant skills through another related donor program involving curriculum development. This curriculum program had introduced team-teaching and simple interactive learning materials. Teachers found they could build on their prior experience to implement Inclusive Education.

At the same time that teachers were building skills and confidence, the local support team had begun a concerted public information campaign and was working hard at building networks of community support. TV and local media aired programs on the initiative. Materials were developed and disseminated widely. Parent training and information sessions were held. The Student Councils of the schools worked with local DPOs to develop a child-to-child program of peer tutoring. These strategies all assisted in ensuring that Inclusive Education became an integral part of the whole school and community, not just focused on classroom curriculum and instruction. As the word got out, more and more people wanted more information and to get involved. Several retired people from the community volunteered as aides in the classroom to assist teachers.

Evaluation was built-in to the implementation process, so that adjustments could be made before problems became too large to handle. One decision that was made early on was to focus initially on only the lower 1-3 grades at the primary school before attempting the upper grades. This decision was partly based on resource considerations, but also because upper grades have a more competitive curriculum. It was felt that children would be more successful if they could start early and build skills in the lower grades.

Teachers and local school teams met regularly to evaluate their progress and to identify barriers. The initiative was not without challenges, however the participants' training in problem-solving and collaboration proved to be invaluable assets. The groundwork of the local support team that had produced community networks provided a safety net and invaluable sources of support. While the community, personnel and students in the pilot schools feel they will always be in the process of becoming an Inclusive School, their initial successes have built further successes. The commitment to inclusion has been firmly established and will sustain further program development.

### **Inclusive Education Framework**

The 'SH School System's' story illustrates the possibilities, but also the complexities of Inclusive Education program development. In order to understand the dynamics and comprehensiveness of Inclusive Education, a framework is necessary. The framework depicted in the figure below is proposed as a conceptual guide to thinking about the network of relationships and factors inherent to Inclusive Education development. It may be used as a conceptual map for educational planning and evaluation in concert with instruments such as the *Index for Inclusion*. This framework builds on the framework for assessing quality in Table 2.14 of the EFA 2002 Monitoring Report (UNESCO), and was developed for all countries—North and South. The figure depicted here includes many of the same components in the EFA framework but contains value-added factors and insights from the literature on Inclusive Education in the South.<sup>57</sup>

The proposed framework includes four domains of inputs, processes, outcomes, and contextual factors in an open-system. An open-system not only accounts for external factors influencing Inclusive Education (e.g., policy, legislation, cultural and socio-economic conditions), but considers these 'external' factors as integral components of Inclusive Education development as a whole. This open-system is a particular strength of Inclusive Education in Countries of the South. Specifically, in the IE literature for Countries of the North, whole-school approaches to IE were typical, rather than whole-community approaches. External factors were also not taken into account in the North to the same extent that they are in the South. Although the framework is used here as an organizing construct to review the literature on Inclusive Education in the South, Countries of the North could also benefit from this four-component open system.

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<sup>57</sup> Specific literature used to develop this proposed frame work included: Save The Children School for All Report 2002, p. 15; documents and articles from Enabling Education Network, Inclusion International, Report of the Expert Group on International Norms and Standards Relating to Disability (1998); the Disability Rights Charter of South Africa; and UNICEF's five pillars of quality education.

# An Input-process-outcome-context framework for Inclusive Education

## II. INPUTS

- School**
- Curriculum content
  - Textbook & learning materials
  - Teacher qualifications, training
  - Morale & commitment
  - Accessible facilities
  - Parent/community support
  - Braille/Sign Language support
  - Action Plans & Needs Assessments
  - Evaluation Plan

- Student Characteristics**
- Diverse Characteristics valued and supported
  - Disability, gender, at-risk, refugee children, minorities, low-income

- Family/Community Characteristics**
- Parental Attitudes/Training
  - Household Income
  - Economic conditions
  - Cultural/religious factors
  - Multi-sector coordination & collaboration



## PROCESS

- School Climate**
- High expectations/respect
  - Guiding Philosophy/Mission
  - Participation/choice
  - Positive teacher attitude
  - Safe and supportive environment
  - Flexible curriculum
  - Incentives for participation
  - Integrated whole-school system
  - Collaborative support teams

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- Teaching/Learning**
- Sufficient learning Time
  - Active teaching methods
  - Integrated systems for assessment & feedback
  - Appropriate class size
  - Adapted curriculum to meet individual needs
  - Active student participation
  - Appropriate supports
  - Clear roles & responsibilities

## OUTCOMES

- Achievement**
- Literacy, Numeracy
  - Good citizenship
  - Personal development
  - Positive attitude towards learning
  - Self-determination/advocacy
  - Self-esteem
  - Social & Independent Living Skills
- Attainment**
- Formal completion
  - Diplomas/qualification
  - Preparation for Adult Life
- Standards**
- Official learning objectives [desired outcomes]
  - School-level objectives
  - Impact on family & Comm.
  - Supportive Govt. Policy

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## III. Contextual Factors

- |  |  |  |
|--|--|--|
| <ul style="list-style-type: none"> <li>• Macro-economic and fiscal policies</li> <li>• Political stability, decentralization,</li> <li>• International coordination</li> <li>• Data collection &amp; analysis</li> </ul> | <ul style="list-style-type: none"> <li>• National goals &amp; standards for inclusive ed,</li> <li>• Sources of funding &amp; allocation</li> <li>• Systematic knowledge transfer</li> </ul> | <ul style="list-style-type: none"> <li>• Ed. System Management</li> <li>• Parental &amp; Community Participation</li> <li>• Community sensitization &amp; awareness</li> </ul> |
|--|--|--|

The first-subsection that follows focuses on priority areas that have been identified as critical challenges to effective Inclusive Education in the South across the four domains of input, process, outcomes and context. Several factors in these domains overlap. For example, participation, awareness, sensitization and knowledge transfer may be considered simultaneously as inputs, processes and outcomes. For purposes of this review, each factor has been arbitrarily assigned to one domain as a practical strategy. This sub-section on challenges in key areas of Inclusive Education program development is followed by a review of gaps in the literature that emerged, and barriers related to these gaps. Again, these examples are not exhaustive, but illustrative. Specifically, the review draws substantially from 24 countries participating in World Bank's Fast Track Initiative. These countries were chosen because they face some of the most challenging barriers to Inclusive Education, but also because they illustrate some of the most promising initiatives. The last sub-section proposes some directions for future study.

### **Challenges and Responses to Inclusive Education in the South**

This sub-section highlights the most challenging and critical aspects of Inclusive Education development in terms of inputs, process, outcomes, and context.

#### **(a) *Inputs to Inclusive Education***

***Demand issues*** provide arguably predominant challenges to Inclusive Education. To meet the demand for SNE, ***access, retention, and drop-out rates*** have plagued efforts in this area. ***Access issues*** are affected by factors at all levels of inputs: student, school, family/community and national. Probably most influential are socio-economic and cultural factors within the family: family economic survival needs (e.g., mothers' choices between sending children to school or having children work to generate income needed for family survival), traditional societal attitudes towards disability that may involve shame, guilt, under-expectations, sheltering/patronization. These factors often combine with distance to school, mobility, school-building accessibility, discrimination, shortage of trained teachers and resource supports to address teachers' working conditions, and shortage of school places. Typical responses to access issues have been modifying buildings, knowledge dissemination and awareness campaigns, teacher and parent training on SNE.

While these efforts have proven helpful, innovative responses that have proven more successful go beyond mere information and training and physical access to ***outreach strategies targeted to specific groups***. In Columbia, for example, the "Colombia Previene en Familia" sponsored literary contests for short stories of testimonials from children with disabilities and art contests for children to express inclusive education through drawings. Several other strategies were formulated as part of a national advocacy campaign targeted at parents, including media dialogues on the rights of the child.<sup>58</sup> Introduction of a Community-Based Program in Guyana involved personal outreach to churches, mosques, and Hindu temples within a 15-mile radius, and all schools and health clinics in the region were contacted. Parents developed puppet shows to present in schools, and a Sunday newspaper column ran for 16 weeks. As a result, 3 to 5 times more people than were needed applied for training as volunteers in the program, and one-quarter of these were family members of children with disabilities.<sup>59</sup>

***Finding, identifying and encouraging children to go to school*** has been another critical challenge. Programs that combine parent education and community awareness with child-find strategies have been most successful. In Guyana, volunteers in a local CBR program formed a Village Health Committee and conducted a joint survey of 4500 people in the village. The survey identified children needing services, and parents conducting the survey helped to encourage parents to send

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<sup>58</sup> Melgarejo, H. Sembrando Cultura de Prevención (2001). *Disability World*. Issue #10. September-October 2001.

<sup>59</sup> O'Toole, B. (1994) Involvement of volunteer, parents and community members with children with special needs. In *Making It Happen: Examples of good practice in special needs education & community-based programmes*. Paris: UNESCO. Pp. 25-31.

their children for services.<sup>60</sup> At Kabale primary school in Mpika, Zambia, a Child-to-Child program conducted a community survey that identified 30 SEN children staying at home, and succeeded in gaining their access to Kabale.<sup>61</sup>

Ingstad (2001) argues that surveys are “highly cherished tools by planners and politicians who usually see this type of information as mandatory” before initiating projects. However, surveys tend to be costly. For this reason, voices have been raised, especially from DPOs, to limit (or drip) the surveys and to “start to give help, on a small scale, to those in need and to expand help as needs arise.”<sup>62</sup>

**Student characteristics** are another critical input consideration. Most countries of the South have concentrated their Inclusive Education efforts on moderately and severely disabled children in four categories: physical/mobility impairments, blindness, deafness and cognitive impairments. This focus is understandable for several reasons: (a) these children have easily identifiable characteristics; (b) providing services is politically high-profile; (c) they are the most disadvantaged and marginalized. However, the vast majority of children with disabilities have mild impairments. These children most likely constitute a significant percentage of drop-outs and grade-level repeaters. The Mozambique Federation of Disabled Peoples Organization (FAMOD), for example, asserts that the majority of out-of-school students in Mozambique are either disabled or have learning difficulties that require special education.<sup>63</sup> Reports from Vietnam indicate that many students with mild disabilities tend to drop out due to “lack of attention.”<sup>64</sup> These students are also more likely to engage in illegal activities and socially deviant behavior than their moderate/severely impaired peers. A number of countries in the South report growing numbers of these children; e.g., street children (many of whom have impairments), but also orphans of HIV/AIDS parents, or children who suffer from various forms of abuse and neglect. SEN needs to systematically attend to these groups of children. Several innovative programs are opening up to include a broad range of SEN students. For example, in India, Spastics Society Schools have redefined their mission and desegregated their schools—opening up admission to ‘slum’ children, and children most disadvantaged in terms of ethnic, linguistic, and gender barriers.<sup>65</sup>

Successful strategies for addressing student characteristics have considered economic needs of students as well, including government stipends for subsidized school fees and costs of school uniforms. Flexible curriculum approaches are also being adopted that allow children to be at home at times they are needed for household chores (and/or to work in order to generate family income).<sup>66</sup>

**Attitudes constitute a third critical challenge** in terms of inputs to Inclusive Education. Traditional approaches to attitudes focus on teacher attitudes in classrooms. However, successful IE programs are finding that one of the “root problems” in terms of access is lack of political will based on attitudes of government officials. Training programs are beginning to target these groups prior to implementing programs. For example, a study funded by ESCAP (Economic and Social Commission of Asia and the Pacific) trained disabled people to organize national training workshops for government officials in Malaysia. The impetus for the training arose from the realization that even though legislation on accessibility and building codes/standards existed, they were not being implemented. These experiences in Malaysia led to a recommendation for specific disability

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<sup>60</sup> O’Toole, B. (1994).

<sup>61</sup> Miles, S. (2000). Enabling Inclusive Education: Challenges and Dilemmas. Paper presented at A Symposium on Development Policy entitled, “Children with Disabilities and the Convention on the Rights of the Child”. Gustav Stresemann Institute, Bonn, Germany. October 27-29. Source of document: [www.eenet.org.uk/theory\\_practice/bonn\\_2.shtml](http://www.eenet.org.uk/theory_practice/bonn_2.shtml)

<sup>62</sup> B. Ingstad (2001). Disability in the Developing World. In *Handbook of Disability Studies*. P. 774.

<sup>63</sup> Lehtomaki, E. (2002). Inclusive Schools in Mozambique. *EENET*, Issue. 6, April 2002, p. 4.

<sup>64</sup> EENET, Focusing on Community Support for Inclusive Education. *EENET*, Issue 2, October 1998, p. 5.

<sup>65</sup> UNESCO (2001) *Developing Sustainable Inclusion Policies and Practices*. P. 85.

<sup>66</sup> UNESCO (2001). Including the excluded: Meeting diversity in education. Example from Uganda. *Combating Exclusion in Education*. Paris: UNESCO.

training targeted at “people who make and implement decisions, people in local government, and particularly technical personnel with responsibility for designing the built environment [e.g., schools].”<sup>67</sup>

In terms of attitudes within local communities, Avoke suggests that “community elders and churches can play a vital role in drive towards radical change in attitudes” and that they must participate in policy development as well as practical implementation.<sup>68</sup>

The literature on IE often cites parental attitudes as significant barriers to disabled children’s attendance and participation in school. The work of SAMADHAN (an NGO in India) focuses on parent-professional partnerships. The underlying principle of their work is that acceptance is a pre-requisite to involvement. Beginning at the pre-primary level, counselors reach out to families and provide emotional support. “In many societies the myths and superstitions which surround the birth of a child with disabilities still exist. It is essential to explode such myths, especially when the mother is cited as the cause for the child’s disability.” Many programs in the literature cite parent involvement as critical, but typically provide ‘awareness’ training in group workshops, and not the kind of individual emotional support provided by SAMADHAN (and/or at the critical infant stages of a child’s disability).

**Conditions of teachers’ work** is yet a fourth critical input in IE programs. Most implementation efforts focus on training teachers effective instructional strategies and ignore the conditions within which teachers must carry these out. Many projects reported in the literature also did not meet goals due to teacher/staff turnover and transfers. EFA Monitoring Report 2002 reports that donor agencies, which countries of the South rely on for teacher training, are reluctant to pay for the recurring costs of teacher salaries. However, teacher salaries account for the large majority of school budgets, and countries cannot afford to pay teachers a living wage. Other conditions of teachers’ work reported to have a significant impact on their ability to deliver effective instruction: class ratios, classroom physical layout, administrative support and supervision, incentives for participation, and release time for preparation and evaluation.<sup>69</sup> The Teacher Development Initiative in India suffered from failing to attend to these factors, noting that: “The most serious barrier to the project has been the attitude of administrators who have insufficient time and patience to learn about and understand its [the program’s] objectives. (page 38)”<sup>70</sup> As a consequence of lack of support, as well as a prescriptive and examination-oriented curriculum, discouraged teachers from trying innovations and “made it difficult for them to implement the new approaches they were learning” (page 38). Further, positive attitudes toward Inclusive Education have been directly linked to teacher supports.<sup>71</sup> Experience with teacher training in Uganda also pointed to the need to clearly define teachers’ roles, not just provide specific skills. Finally, upgrading teachers’ skills is a developmental process that goes beyond workshops and other in-service training activities. Teachers need time to develop confidence and coping strategies and to do this in the context of continuous support in the classroom.<sup>72</sup>

**Retention and drop-out rates** have been linked to **curriculum and instruction**. Typically the focus has been on adapted curriculum and upgrading teachers’ skills by providing training in child-centered, active pedagogy/instruction. Less often, the curriculum content itself is challenged. Innovative approaches to making the curriculum relevant, tying it to functional life -skills, and

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<sup>67</sup> ESCAP (2001). *Pathfinders: Towards Full Participation and Equality of Persons with Disabilities in the ESCAP Region*. New York & Geneva: United Nations. P. 31.

<sup>68</sup> Avoke, M. (2002). Models of disability in the labeling and attitudinal discourse in Ghana. *Disability & Society*. 17(7). Pp. 769-777.

<sup>69</sup> Jangira, N., Ahuja, A. (1994). Teacher development initiative (TDI) to meet special needs in the classroom. In *Making it Happen*. Paris: OECD

<sup>70</sup> Jangira & Ahuja (1994).

<sup>71</sup> Arbetter, S., & S. Hartley (2002). Teachers’ and Pupils’ Experiences of Integrated Education in Uganda. *International Journal of Disability, Development and Education*. 49(1). Pp. 61-78.

<sup>72</sup> Arbetter and Hartley, 2002.

matching it with cultural beliefs and priorities is directly related to improved retention rates.<sup>73</sup> The lesson that has been learned is that adapting a curriculum that is not relevant or is not teaching functional life skills in the first place, does little to motivate students to stay in school. In India, for example, UNESCO reports that: Many parents cite the irrelevance of the curriculum as a reason for not sending their children to school. They feel the curriculum is not geared to real life, and fruitful years of income generation will be lost even if the child receives only a primary education.”<sup>74</sup> Curriculum development is therefore seen as an important **input** to Inclusive Education programs as well as process. UNESCO’s 2001 in-depth case study of Uganda describes an alternative basic education program that focused on functional life skills, and built on the cultural values of the semi-nomadic Karaimojong families. While still in implementation phase, the project has already reached 8,000 children.<sup>75</sup>

A thematic study, *Education for All and Children who are Excluded* (2001), provides a comprehensive documentation of patterns of exclusion, causes, and conditions at school, administrative and national levels that affect exclusion and drop-out rates. The report identifies the excluded learners as those who: (i) are not considered to ‘fit’ into majority-based classrooms; (ii) contradict accepted norms of who can or should learn; (iii) cannot afford the cost of the time of schooling; (iv) are not free or available to participate (e.g., geographically isolated children, child soldiers or unregistered migrants); (v) are living in the context of disaster.<sup>76</sup>

Schools contribute to excluding children when they: (i) apply narrow paradigms and are unable to cope with diversity; (ii) fail to concern themselves with children who do not turn up and do not track the non-attende; (iii) do not reach out proactively to the families of children who are the most vulnerable.<sup>77</sup> With regard to this last factor, the Convention on the Rights of the Child (CRC) stresses that families and parents should be the first line of intervention in and support for children. “Families are the key in keeping children out of exploitative working conditions and in school; the opposite is equally true.”<sup>78</sup>

A program in Brazil that addresses exclusion and focuses on links between curriculum and retention rates provides an exemplary model of what can be done.

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<sup>73</sup> UNESCO (2001). Including the excluded: Meeting diversity in education. Example from Uganda. *Combating Exclusion in Education*. Paris: UNESCO.

<sup>74</sup> UNESCO (2001). *Developing Sustainable Inclusion Policies and Practices*. P. 84.

<sup>75</sup> UNESCO (2001) *Including the excluded*. P. 23.

<sup>76</sup> A. K. Bernard (2001). *Education for All and Children who are Excluded*. Paris: UNESCO. P. 11.

<sup>77</sup> A. K. Bernard (2001). Pp. 5-6.

<sup>78</sup> A. K. Bernard (2001). P.

### **The Open School Methodology in Brazil**

Students themselves shape their own pathway, in their own rhythm and not at a timing dictated by the system. The student's progress to the next level as soon as they accomplish a particular task and their performance and behavior are assessed daily. If the students find that they need to interrupt their schooling, they can pick up again from the point at which they stopped. There is no repetition and promotion takes place as and when it fits in with the student's learning. There are no formal tests. With a 'pass card', the students shape their own school day and agenda, plan their own activities and set out their own learning. The curriculum with which the teachers work is found in the daily lives of the students. Besides learning basic skills, the students also learn about basic health and nutrition. The school is open all day long and the students receive their meals there. The school has a basic rule never to give up on a student.

Source: Extract from a case study of inclusive education in Brazil, commissioned by UNESCO 1998, as reported in Lynch, 2001, p. 36.

A report published by UNESCO (2001) suggests some key elements for inclusive curriculum that derive from the work of several countries.<sup>79</sup> These elements may also be linked to retention (page 9):

- v Broad common goals defined for all, including the knowledge, skills and values to be acquired;
- v A flexible structure to facilitate responding to the diversity and providing diverse opportunities for practice and performance in terms of content, methods and level of participation;
- v Assessment based on individual progress;
- v Cultural, religious and linguistic diversity of learners acknowledged and
- v Content, knowledge and skills relevant to learners' context (UNESCO, 1999b).

A national example of parental involvement to address retention and drop-out rates is the South African Schools Act of 1996. This Act supports the optimal involvement of parents in the education of their children and also requires majority representation by parents on school governance boards. To build parental capacity for involvement and to reduce drop-out rates, parent-run organizations in South Africa provide various supports: conducting self-empowerment programs for parents of children with disabilities in rural and disadvantaged areas, lobbying for parents' and children's rights, disseminating information to parents through workshops and newsletters, offering parent counseling.<sup>80</sup>

#### **(b) Processes of Inclusive Education**

The input-process-outcome-context model for IE indicates School Climate and Teaching/Learning as two broad domains concerned with process. Within these process domains, a whole-school approach to Inclusive Education is emerging as critical to effective implementation, as it is in the North. Basic principles of whole-school approaches include participation and collaboration. Participation has come to mean more than just professionals and communities. In Nicaragua, for example, a rural primary school was one of the first schools to establish a student council under

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<sup>79</sup> UNESCO (2001) *Overcoming Exclusion through Inclusive Approaches in Education: A Challenge and a Vision*. Paris: UNESCO

<sup>80</sup> P. Engelbrecht, L. Green, S. Naicker & L. Engelbrecht (1999). *Inclusive education in action in South Africa*. Pretoria: J. L. van Schaik Publishers. P. 177.

which students took an active part in school-decision making.<sup>81</sup> A basic principle of Child-to-child programs also emphasizes student responsibility for learning and participation in whole-school initiatives. A personal change process appears to be important for changing attitudes as part of the process of teaching and learning. In Uganda, teachers reported ignorance, fear, and a lack of confidence were root causes of their attitudes towards children with disabilities before these children entered their classrooms. As they “got used to” these children, they reported increased confidence, coping strategies, and positive attitude change.<sup>82</sup> Disabled adults as role models in schools also have proven successful as innovative alternative approaches to the traditional school aides. In Deaf Education, students are often pulled out of the classroom to learn sign language. Okwaput (2001) recommends that *all* children receive training in sign language to promote social inclusion and positive school climate.<sup>83</sup>

Beyond a ‘whole-school’ approach to implementing IE, the proposed framework indicates an open-system. Promising and sustainable practice in IE goes beyond in-school and whole-school collaboration efforts to link with other sectors and the community. Collaborative Support Teams are an innovative approach adopted in Vietnam. A comprehensive CBR program in Vietnam encompasses several of the major provinces across the country. The program links education and health sectors to provide joint training of services, and is fully integrated into the Primary Health Care Network of hospitals, clinics, and rehabilitation centers. Local Community Support Teams consist of community leaders, education and health workers. Social workers, representatives from women’s and youth unions, and parents of disabled children. The goal is to enhance the conditions needed for school-readiness and school attendance through support to families and to reach a large number of children. The program is run at a cost-level that can be maintained by local communities.<sup>84</sup>

### (c) *Outcomes of Inclusive Education*

This domain is perhaps one of the most underdeveloped of all domains in Inclusive Education Programs in the South as well as in the North. In addition to being under-developed, evaluations have traditionally focused on summative data, to interpret effects of programs. Currently in the literature, IE programs are beginning to place more emphasis on continuous evaluations as inputs (e.g., assessments of needs and feasibility studies), process (both formative and summative evaluations of the implementation activities) and outcomes/impacts of IE programs. As an example of *input assessment*, prior to implementing an Inclusive Education project in Nicaragua, four data instruments were used to carry out a situation analysis in each school.<sup>85</sup> These input assessments are often successful in promoting sustainability. Another example of successful sustainability in the literature comes from Guyana. Their CBR project actively involved parents, who established a Village Health Committee and conducted a needs assessment. As a result of the needs assessment, they set up a Resource Centre in the village near the elder leaders’ compound. From this, they converted the Centre into a Regional School, and now conduct a regional CBR program.<sup>86</sup>

*Process assessments* are emerging in the form of action research projects conducted by teachers, with technical support and training. The UNESCO supported Inclusive Schools project in Nicaragua used this model with teachers who were involved in action research projects. Regular meetings were

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<sup>81</sup> UNESCO (2001). *Inclusive Schools and Community Support Programmes. Phase Two*. Paris: UNESCO

<sup>82</sup> Arbetter, S., & S. Hartley (2002).

<sup>83</sup> Okwaput, S. (2001). A conducive environment for inclusive education: Some experiences from north-eastern Uganda. *African Journal of Special Needs Education*. 6(2). Pp. 95-98.

<sup>84</sup> Hai, T. T., Thu Nhan, N. (1995). Linkiung with Primary Health Care Services: Experiences from Vietnam. In *Innovations in Developing Countries for People with Disabilities*. O’Toole, B. and R. McConkey (Eds). Lancashire: Lisieux Hall Publications. Pp. 199-210.

<sup>85</sup> UNESCO (2001) *Inclusive Schools & Community Support Programmes: Phase II*

<sup>86</sup> O’Toole, B. (1994). In *Making it Happen*. Pp. 25-31.

scheduled for them to share experiences and deepen the action research process.<sup>87</sup> The project experienced several barriers to effective implementation of the model: a lack of a co-coordinating plan to guide implementation was cited as a key weakness.

To address the challenge of planning for assessment, Uganda's government restructured their educational system to support Inclusive Education. Administrative oversight was decentralized to regions, and an Educational Assessment & Resource Service Staff member was assigned to each region. The Educational Assessment staff person's role was to (1) ensure that SEN students are enrolled in school and continued to attend, and that their needs were being met. At the school level, two committees provided oversight: the School Management Committee, and the School Finance Committee. The Parent Teacher Association also participated in oversight.<sup>88</sup>

Undertaking assessments requires skill and training. More programs are reporting specific focus on assessment in their training activities. UNESCO recently developed a manual for administrators and educational leaders. This *Open File on Inclusive Education* contains a comprehensive section on education assessment to inform planning and provision of services as part of quality IE. Assessment issues covered include school-level, classroom-level, and community-level strategies.<sup>89</sup> The *Index for Inclusion* has been piloted in several countries of the South (India, South Africa, Brazil) and is another assessment tool for assessing quality IE through studying development activities.<sup>90</sup>

An interesting process approach that combines aspects of teacher action research and knowledge transfer was reported by Lehtomäki (2002). The province of Maputo in Mozambique organized an inclusive education competition. Teachers were invited to submit case reports of strategies they used to identify and instruct SEN students in their classrooms. A panel of education officers and teachers juried the reports. Jurists read the reports, listen to teachers' presentations, discuss the inclusive school practice, and evaluate training needs. Awards for best case reports included bicycles, radios, and books on Inclusive Education. The second stage of the competition involved knowledge transfer to schools in Maputo and public education activities.<sup>91</sup>

**Outcomes of IE** are often illusive and difficult to measure. Student achievement tests of content knowledge provide only one indicator of impact, and are not strongly linked to success in adult life, nor do they provide a measure of creative and analytical problem-solving skills needed for survival. The challenge is to measure success in terms of broad indicators of outcomes and impact. Stubbs (1993) suggests that IE programs look for improvements at all levels: individual, family, community, organization, and government. Specific indicators include: presence, participation, choice, respect, knowledge and skills.<sup>92</sup> Lynch (2001) advocates for evaluation of Inclusive Education programs at all levels (institutional and teacher performance as well as student performance) and against the goals of inclusion within a democratic, human-rights-based environment.<sup>93</sup>

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<sup>87</sup> UNESCO (2001). *Inclusive Schools and Community Support Programmes. Phase Two*. Paris: UNESCO

<sup>88</sup> UNESCO (2001). *Combating Exclusion in Education*

<sup>89</sup> UNESCO (2001) *Open File on Inclusive Education: Support Materials for Managers and Administrators*. Paris: UNESCO.

<sup>90</sup> Booth, T., K. Black-Hawkins (2001) *Developing Learning and Participation in Countries of the South: The Role of an Index for Inclusion*. Paris: UNESCO.

<sup>91</sup> Lehtomäki, E. (2002). Inclusive Schools in Mozambique. *EENET*. Issue 6. April, 2002. Pp. 4-5.

<sup>92</sup> Stubbs, S. (1993). *Integrating Disability into Development Programmes*. EENET. Source: [www.eenet.org.uk/theory\\_practice/integrat.shtml](http://www.eenet.org.uk/theory_practice/integrat.shtml).

<sup>93</sup> J. Lynch (2001). P. 22.

The preceding sub-sections have highlighted examples of IE best practice in the South. These examples appear to be ‘islands of excellence’. That is, best practice is not widespread, but the programs that have been created provide exemplars that could be adapted and applied more broadly—both within and across countries. These exemplars include the following quality indicators for Inclusive Education in the South:

- v Early intervention when children are still in the formative stage of development
- v Small classes
- v Well-trained and valued teachers
- v Multi-ability groups
- v Positive learning environments (that is, a sense of community and commitment to mutual benefit)
- v Strong parental involvement

The examples of best practice have also highlighted a number of barriers that must be addressed in order to develop and expand successful IE programs. These barriers represent challenges and needs at all system levels (micro, meso, macro)<sup>94</sup>:

•**Attitudes**: negative attitudes towards SEN learners result in discrimination, prejudice, exclusion from school and/or exclusion from full participation in school

•**Law/policy**: laws and policies supporting Inclusive Education have not been enacted in many countries and/or may not be enforced

•**Socio-economic factors**: Inadequacies of school resources, not enough qualified teachers, poverty in families that make school unaffordable or force children/youth to stay out of school to work

•**Environment**: inaccessible school buildings (especially for those with physical disabilities), unhealthy or unsafe means of transportation to school and/or unsafe environments within schools

•**Language and Communication**: The language/format of instruction, in some cases is not the first language of learners, especially for Deaf, Blind, and Deaf-Blind learners.

•**Resources**: lack of texts and materials needed for adaptations to the curriculum and instruction, lack of adequate supports for classroom teachers

•**Curriculum**: not enough teachers trained in the pedagogy to meet the needs of diverse abilities in large classes, in many cases lacking in relevance, high repetition and drop-out rates associated with curriculum problems

•**Inadequate or uncoordinated human resource development**: lack of access to quality health care; early intervention services for prevention and amelioration of disabilities are either not available, inaccessible due to distances families must travel, or not able to serve more than a fraction of those needing services

•**Organization and Governance**: lacking the infrastructure, training and personnel to provide leadership and support to programs

•**Knowledge base**: no accurate picture of numbers of learners excluded from the system or how many of them have impairments. Coupled with little data on IE program effectiveness—inhibits planning.

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<sup>94</sup> This list has been adapted from *Overcoming Exclusion through Inclusive Approaches in Education*, UNESCO (2001), pp. 5-6.

Barton and Armstrong (2001) argue that barriers arise in the ways that policies are made, interpreted, and enacted at the levels of discourse, attitudes, assessment, curriculum and pedagogy, and the distribution of resources.<sup>95</sup> Essentially, barriers to IE are interactive. Dropping out, non-enrolment and school failure are all symptoms of “an intricate web of education-related factors that play out in a process of being and becoming excluded” on an individual, group, and societal level.<sup>96</sup> Lynch (2001) asserts that pressures to move to more inclusive systems are facing strong countervailing pressures. Thus, “if EFA is to be achieved, it is essential to have an articulated strategy, including appropriate financial and policy parameters, that identify and tackle those countervailing pressures and all barriers to inclusion explicitly, and effectively deal with them in order to facilitate the achievement of the goal of EFA.”<sup>97</sup>

This review of challenges, barriers and responses to Inclusive Education in the South provides some key lessons. These lessons mirror those in UNICEF’s 2002 report, “The Global Agenda for Children: Learning for the 21<sup>st</sup> Century.” As a conclusion to this sub-section these lessons are summarized below:

#### **Validated Program Approaches and Key Lessons**

1. Education goals are often elusive and difficult to measure.
2. Development takes time.
3. Process is often as important as product.
4. Decentralization and autonomy are important tools but not panaceas for solutions.
5. Partnerships and networks are needed at all levels of the system.
6. Integrated and multi-sectoral approaches to learning are essential.
7. Good practices must be carefully analyzed and promoted, and models of good practice must be creatively used.
8. Diversity, not standard solutions to complex problems, must be the norm.
9. Mobilization and advocacy at all levels are essential.

#### **Gaps in the Literature**

The preceding review of challenges and promising IE practice in Countries of the South reveals several gaps in the literature. These are summarized below.

##### ***1) Identification and Placement***

Most countries of the South have concentrated their Inclusive Education efforts on moderately and severely disabled children in four categories: physical/mobility impairments, blindness, deafness and cognitive impairments. Of these four, a fifth category—deaf-blind appears to be overlooked in country reporting and service provision. This group has unique cross-categorical needs that must be addressed. Malnutrition is a leading cause of mild cognitive impairments, and effects last over a lifetime. A number of countries in the South report growing numbers of street children, many of whom have impairments (Brazil, Mozambique, Uganda, Zambia). Very little in the current literature offers information and strategies in this area. A notable exception is Artile’s and Hallahan’s edited volume, *Special Education in Latin America* (1995).<sup>98</sup>

<sup>95</sup> L. Barton & F. Armstrong (2001). Disability, Education, and Inclusion: Cross-Cultural Issues and Dilemmas. In *Handbook of Disability Studies*. G. Albrecht, K. Seelman, & M. Bury (Eds). London: Sage Publications. Pp. 693-710. Cite is from P. 703.

<sup>96</sup> A. K. Bernard (2001). P. 4

<sup>97</sup> J. Lynch (2001). *Inclusion in Education: The Participation of Disabled Learners*. Paris: UNESCO. P. 5.

<sup>98</sup> Artiles, A., Hallahan, D. (1995). *Special Education in Latin America: Experiences and Issues*. London: Praeger.

## 2) *Access/Equity Issues*

Barriers students face that prevent their attendance and participation in school are well known and have been articulated in this review. Less well known and documented are specific strategies and examples of successful approaches to addressing access. Access and equity issues are inter-related, and underpinned by discrimination. Almost all Countries of the South report legislation, regulations and policies that address equity issues. Less well known or documented is the ways in which these laws and policies are enforced, monitored and evaluated. Finally, the literature is virtually silent on gender issues in relation to access and equity for disabled children. Girls and boys, whether disabled or not, face different barriers. Lack of attention to differences in gender may reveal the still prevalent medical model of disability that focuses on impairments to the exclusion of all other human characteristics.

## 3) *Teacher training—personnel supply and retention*

The predominant focus in the literature has been on continuous, in-service training. This focus is understandable given the emergency crisis of teacher shortages in many countries, so that upgrading of existing teachers' skills becomes necessary (in part to deal with larger class sizes that have resulted from UPE policies). The monumental challenge is to prepare more teachers faster and within a rigorous professional framework. There is some focus in the literature on pre-service training, but not as much as one would think, given the need to consider long-term as well as short-term solutions to teacher training. Coordination with university faculty of education and teacher training colleges to provide training activities would help build capacity and sustainability. Further, training on child-centered pedagogy and other effective teaching strategies are not unique to Inclusive Education, nor are SEN students the only students who benefit from these approaches. In fact, these strategies are central to current training in general education and are essential for the academic success of all learners, SEN learners included. Essentially, if a learner does not have the opportunity to experience effective teaching and learning, their present and future options are consequently put at-risk.<sup>99</sup> Despite the critical importance of effective teacher training for all students (general ed and SEN), the literature does not provide much evidence of integration or "inclusive ed" at the university level, where teacher training takes place on a sustained, intensive level.

Many projects failed or did not reach goals due to high teacher/staff turnover. There has been little attention in the literature directed at whole-school approaches to address critical retention factors; i.e., the conditions of teachers' work. These go beyond the perennial problem of class ratios, to include more practical and relatively easy to address physical conditions, administrative support and supervision, incentives for participation, and release time for preparation and evaluation. Teacher salaries are a major concern. They constitute 80% of all school costs, but donor agencies, which countries of the South rely on, are reluctant to pay for recurring costs. Programs that provide incentives for teachers, and that enjoy a higher retention rate have not been documented to any extent.

## 4) *Assessment*

There is a great lack of alternative analytical tools to establish benefits of investment in education, broaden the scope, and look at social benefits. There is also very little comparative research in the literature on Inclusive Education. Most of the literature provides case studies of single countries, regions, or programs. Comparative studies would go a long way towards explaining differences in IE development rather than the current focus on "unique needs and contexts." For example, scarce resources and large class sizes do not per se make a difference in quality of education—variables of government and socio-cultural factors may play a larger role. Willms (2000) asserts that there is mounting evidence that social capital (e.g., inclusive societies, norms and values in communities) and inequalities in social outcomes appear to be a strong determinant of health and well-being, and that these are related to development indicators.<sup>100</sup>

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<sup>99</sup> A. K. Bernard (2001). P. 4

<sup>100</sup> J. D. Willms (2000). *Standards of Care: Investments to Improve Children's Educational Outcomes in Latin America*. Paper presented at Year 2000 Conference on early Childhood Development. April 8, 2000. Washington, D.C.

Both Countries of the North and of the South lack even basic data on numbers of children and the demand for IE/SEN services. Hegarty (1998) asserts that “the information base that would underpin a comprehensive account of special education within Europe is simply not available.”<sup>101</sup> The EFA Global Monitoring Report (2002) makes similar assertions; i.e., “the international data critically important for planning are either not available or unreliable and “there is an urgent need to improve the quality and availability of a wide range of international data.”<sup>102</sup> Bernard (2001) reports that anecdotal evidence suggests that innovations are showing positive effects, but there is little systematic assessment of their quality and impact. Further, “Instances of serious and interactive exclusion remain without good explanations as to how to disentangle them.”<sup>103</sup> These findings echo the results of this literature review.

Finally, in terms of student outcomes, the proposed input-process-outcome-context framework for IE provides distinctions among student outcomes of achievement, attainment and standards. The EFA framework makes identical distinctions, such that achievement measures what students ‘really’ learn; attainment measures the number of students who acquire formal and/or desired qualifications, and standards measure outcomes sought by society. For SEN students in Inclusive Education it is especially important to make these distinctions, although these are rarely found in the literature. Further, social and academic outcomes must be recognized as interdependent.<sup>104</sup>

It is important to note here, the participation of low-income countries in the large-scale studies of students’ academic achievements, such as the TIMSS (Third International Mathematics and Science Study) study. The TIMSS study has received a great deal of attention in the literature (supportive and critical) with respect to methodology and reporting of academic achievement outcomes for students. For example, Willms (2000: p. 2) points out that the data from this study has not provided information on effects of SES, gender, nor quality of schooling [and one could add, disability]. Another large-scale study by Willms and Somers looks at the effects of grade repetition in Latin American countries. The study found strong links between grade repetition and achievement on test scores. Further, two of the most important factors affecting outcomes were the learning climate of the classroom and extent of parent involvement. These studies point to the need to assess school contexts as well as learner characteristics, and to interpret achievement scores with caution.

Scores on standardized tests are coming under more and more critical scrutiny in the literature (See for example, H. M. Levin in *Educational Researcher*)<sup>105</sup>. Some of the weaknesses of standardized tests and their uses include: encourage the accumulation and recall of fragmented and decontextualized facts and skills; used to rank and sort schools and children; narrows the curriculum as teachers concentrate their teaching on the information, forms and formats required in the tests; and reinforces bias in terms of gender, race, ethnicity and social class (Supovitz & Brennan, 1997).<sup>106</sup> Alternative assessments and accommodations to standardized tests are gaining in usage. Examples include curriculum-based assessment and portfolio assessment. These alternatives address a need identified in the Expanded Commentary on the Dakar Framework for Action: “Since the pace, style, language and circumstances of learning will never be uniform for all, there should be room for diverse formal or less formal approaches, as long as they ensure sound learning and confer equivalent status.”<sup>107</sup> Literature on alternative assessments, their development, use and impact, is lacking in the South. In fact, some of

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<sup>101</sup> Hegarty, S. (1998). Challenges to Inclusive Education: A European Perspective. In *Inclusive Schooling: National and International Perspectives*. S. Vitello & D. Mithaug (Eds). London: Lawrence Erlbaum Associates. Pp. 151-165. Quote, p. 152.

<sup>102</sup> UNESCO (2002) *Education for All: Is the World on Track?* Paris: UNESCO, p. 192.

<sup>103</sup> A. K. Bernard (2001) P. 20.

<sup>104</sup> J. Lynch (2001). 36

<sup>105</sup> H. M. Levin (1998). Educational Performance Standards and the Economy. *Educational Researcher*. Vol. 27, No. 4. Pp. 4-10.

<sup>106</sup> J. Supovitz & R. Brennan (1997) Mirror, Mirror on the Wall, Which is the Fairest Test of All? An examination of the equitability of portfolio assessment relative to standardized tests. *Harvard Educational Review*. Vol. 67, No. 3. Fall. As reported in UNESCO (2001), p. 10.

<sup>107</sup> World Education Forum 2000, para. 8. As reported in J. Lynch. P. 11.

the examples given in this review provide evidence that many countries still rely heavily on standardized test scores to measure student achievement (and teacher performance).

#### **5) Knowledge Transfer**

International and local coordination are seen as the sine qua non conditions for education development. Several strategies for coordination have been reported in the literature, but little information on systematic models or frameworks. Also, it would be important to study the effects that government decentralization has on knowledge transfer.

#### **6) Secondary, tertiary, adult and alternative education programs**

The MDG focuses as a first priority on universal primary education. This focus is understandable, given the large numbers of primary students (both SEN and non-SEN students) who currently do not have access to education. This review found few instances of IE beyond the primary level. One exception is Latin America. In Honduras, the IE education programs have been supported by the Partners of the Americas Project for over two decades. This length of time has allowed the school system to introduce IE at the secondary level. The other example from Latin America is Mexico. This country has recently developed policies for inclusion of students with disabilities at the primary and secondary as well as tertiary levels.<sup>108</sup> Finally, few examples of functional curriculum and alternative programs were found at either the primary or secondary level. If the goal of IE is to prepare students for adult life, this gap in the literature is a significant barrier to understanding ways this goal might be achieved.

#### **7) Use of technology to support Inclusive Education**

Technology supports for students with both mild and moderate/severe disabilities have been introduced with success in Countries of the North, particularly the United States. US law now requires that technology supports be considered and documented in SEN students' individualized education plans. In terms of the South, David Werner (*Disabled Village Children*) describes many ways simple and low-cost technology has been developed and used with learners who have various impairments.<sup>109</sup> Technology has various uses for children with disabilities. For example, it may enhance communication (voice simulators), or provide individualized software of content area subject-matter for children and youth with learning difficulties. The only example of technology found in this review was a project in Brazil that used computers to provide education to street-children and physically impaired children.<sup>110</sup> New technology requires resources that may well be beyond the capacity of most school systems in the South, and therefore has not gained much attention. However, as technology is introduced in schools, it will be necessary to ensure access and use by SEN students, and to monitor, and evaluate success. Overall, technology and inclusion are very fertile grounds for enhancing education of SEN students in the future.

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<sup>108</sup> For more details of Mexico's policies see *Programa Nacional de fortalecimiento de la educación especial y de la integración educativa* and *Manual para la Integración de Personas con Discapacidad en las Instituciones de Educación Superior*, Secretaría de Educación Pública, 2002. The document may be downloaded at: [www.discapacidad.presidencia.gob.mx](http://www.discapacidad.presidencia.gob.mx)

<sup>109</sup> D. Werner (1988) *Disabled Village Children*. Palo Alto: Hesperian Foundation

<sup>110</sup> Valente, J. (1995). The Use of Computers with Disadvantaged Children in Brazil. In *Special Education in Latin America: Experiences and issues*. A. Artiles \* D. Hallahan (Eds). London: Praeger. Pp. 77-114.

### **New technology and inclusion**

The information highway has given people with disabilities new advantages and opportunities never before available; people with even the most severe mobility impairments can now participate in knowledge-based industries without leaving their homes; blind people can use inexpensive adaptive devices that convert printed text to sound or Braille; through voice to text interfaces – that is computers that you can talk to – technology is now accessible to people who cannot use keyboards. And of course, electronic communication is of particular significance to people who are deaf or hearing impaired. But, perhaps the greatest advantage of the new technology is that people can communicate with each other without preconceived stereotypes based on a person's color, sex, age, origin or disability. On the internet, everyone is equal.

Source: Extract from a speech by Michell Falardeau-Ramsay, Chief Commissioner, Canadian Human Rights Commission, Quebec City, 22 October 1999 as reprinted in Lynch (2001), p. 46.

#### **8) Social Context**

Millennium development goals (MDG) and much of the Inclusive Education literature focus on educational systems analyses that is isolated from the wider societal context. This last gap is perhaps the most significant of all, especially considering the numerous social, political and economic context barriers to attendance and participation that have been identified in the literature.

#### **Considerations for Future Study**

Several critical issues emerge from the IE literature as an opportunity to refocus efforts in Inclusive Education and to improve effective practice. This review has uncovered four that appear to be compelling: (1) human rights, (2) decentralization, (3) partnerships for change, (4) embedded teacher training. Exemplars from several of the 24 'Fast-Track' Countries of the South reveal significant needs in these three areas that also appear to be associated with particular regions. These needs also appear to be associated with emerging strengths that could be capitalized on for future study. This sub-section explores the possibilities of these three critical issues by region. In each region, a case is argued for focus on a particular country based on a review of Poverty Reduction Strategy Papers (PRSPs) and current country assistance projects. While particular countries are suggested, opportunities for regional cross-country comparisons should be considered as well.

##### ***(a) Sub-Saharan Africa, DPOs and Human Rights***

Zambia, Zimbabwe and South Africa share borders and a strong history of active Disability Rights Organizations. Most DPOs in the region have been actively engaged in education activities—formal, informal and nonformal sectors for at least a decade. The South African Federation of the Disabled (SAFOD) enjoys a strong regional presence, providing coordination and support for national-level initiatives. The African Decade of Disabled Persons 2000-2009 was declared by the Organization for African Unity, and has received support from the United Nations. The African Decade has a number of key objectives, including poverty alleviation and reduction through economic support and education; advocacy and lobbying for policies and legislation; and awareness raising on disability issues and human rights in Africa.

A research study by Elweke provides evidence of strong correlations between active DPOs and national legislation directed at disability rights.<sup>111</sup> Considering the involvement of DPOs in the Sub-Saharan region, it is perhaps not surprising that Zimbabwe and South Africa in particular have strong legislation and specific educational policy on Inclusive Education. The literature identifies national legislation and inclusive education policy as critical prerequisites to effective Inclusive Education. The

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<sup>111</sup> Eleweke, J. (2001). Physician Heal Thyself: The role of Disability Organizations in countries of the south towards improvements in Special Needs Provision. *African Journal of Special Needs Education*. 6(2), September 2001. Pp. 107-113.

situation in the region provides fertile ground for advancing knowledge regarding legislative and policy development. Investigation of the history of activities by DPOs, their political strategies, and impact on services would assist in improving the track record on this issue.

*Zambia* has been identified as a Fast-Track country for support, and is categorized as at serious risk for meeting EFA goals by 2015. Zambia's GDP has declined, with the lowest government allocation for education in all of Africa. PRSPs indicate a priority for poverty reduction and call for deepening the analysis between poverty and policies that promote growth. A Basic Education Sub-sector Investment Program Support Project has been underway since 1999. The project contains a strong law and justice component, and 20% of project funds have been allocated to the Ministry of Education to undertake school construction and bursary schemes for poor children. Zambia's neighbor, Zimbabwe, is categorized as likely to be very successful in meeting EFA millennium goals. What are the differences? How could the regional strengths of DPO human rights activities be used to improve the capacity/impact of education and health sectors in both Zimbabwe and Zambia for *all* children and youth? Further, Zambia and Zimbabwe are two of the countries hardest hit by the HIV/AIDS pandemic. What are the intersections between health, education, and disability in these countries? How has the disability community responded to the HIV/AIDS crisis? How could this knowledge be used to improve the situation in schools?

**(b) Latin America, Democratization, and Decentralization**

Literature on Inclusive Education focuses perhaps least in this region compared to other regions of the world. Yet, some of the most innovative Inclusive Education programs originate in several of these countries. Many are states in transition from authoritarian regimes to democratic states. Democratization has been accompanied by a strong trend toward decentralization across sectors. Transition and its democratic ideologies have influenced school governance as well as teaching and learning. For example, Columbia, Honduras, and Guatemala all have experimental Escuela Nueva Schools that operate with a clear philosophy and vision of inclusion.

In Latin America, teachers have been involved in intense political activities, following the tradition of Paulo Freire's literacy and conscientization pedagogy. This pedagogy integrates political awareness with content knowledge. Ideology, attitudes and political will/commitment to Inclusive Education have been cited throughout the literature as key to success. Further, economic strength and wealth have been widely hypothesized as highly correlated with educational access and quality. Yet a number of countries in Latin America do not fit this pattern (Artiles & Hallahan, 1995). Case studies that would investigate, for example the effect of systemic influences on teacher attitudes toward Inclusive Education and children/youth with impairments would advance our knowledge related to the critical factor of attitudinal influences. Specifically, it is widely known that teacher attitudes influence teaching and learning, but how do systemic factors related to decentralization and social contexts mediate these attitudes? With what impact? What part does decentralization play in school morale? In equity and access for marginalized students?

*Special Education in Latin America* is one of the few books that takes a theoretical and macro-level conceptual approach to understanding Inclusive Education. The book uses this conceptual approach in the chapter authors' rich multi-level descriptions of innovative programs. One of the most provocative in this volume is the international cooperation model of integrated special education/teacher education programs in *Honduras*. The *Vermont-Honduras partnership* has been collaborating around teacher training, SEN and school restructuring for Inclusive Education since 1975. The sister program in Vermont (USA) is the home of Thousand and Villa—two US researchers who have published extensively in the field of Inclusive Education and who have pioneered efforts for Inclusive Education in the United States. The partnership appears to have benefited both countries. Honduras is one of the few countries in the literature that reports experience and success with Inclusive Education at the secondary level.<sup>112</sup> Efforts in Honduras' IE schools have also included integration of multi-grade teaching, intercultural and bilingual education. A consortium of Central American universities, led by the Pedagogical University of Honduras, is currently developing a

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<sup>112</sup> McNeil, M., Villa, R., Thousand, J. (1995). Enhancing Special Education Teacher Education in Honduras: An International Cooperation Model. In *Special Education in Latin America*. London: Praeger. Pp. 209-230.

plan of action to prepare pre-service teachers for inclusive schooling.<sup>113</sup> A Community Based Education Program supported by World Bank funding began in Honduras in 2001. The CBE Program's goal is to improve the quality of inter-cultural and bi-lingual education among indigenous communities. The Program includes a strong parent and school-based component, which are central activities in the Escuela Nueva IE Schools. These conditions provide an opportunity to capitalize on the strengths and philosophy, rich and extensive history of IE in Honduras to the benefit of both programs.

**(c) East Asia/Pacific, Economies of Scale and Partnerships for Change**

Nearly two-thirds of the world's disabled people live in South and Southeast Asia. Disabled women and girls face perhaps some of the most severe discrimination of any region in the world. Strong cultural beliefs about disability as an ancestral punishment still predominate in Asian societies. Enrolment rates for primary education are still lower than 70% in some countries. *Vietnam* is one of the world's most densely populated countries, with an estimated one million disabled children. The incidence and prevalence rates for children may be inflated due to the effects of Agent Orange. Improving the quality of education and basic health care, especially among the poor, are priority issues in Vietnam. While access to primary education has reached 92%, PRSPs urge the Vietnamese government to enhance efforts and to specify detailed strategies for reaching the last 6-8% still without access to school. Innovative programs to identify and refer children have been undertaken. This literature review indicates that the majority of these children may well be those with SEN and/or impairments. Currently, the World Bank has provided investment funds for three active projects in Vietnam relevant to Inclusive Education: The *Higher Education Project*, *Population and Family Health Project*, and *Primary Teacher Development Project*. The experiences and expertise of the CST/CBR partnership program to link health and education sectors to enhance lives of children with impairments and their families could be capitalized on to strengthen these projects.<sup>114</sup>

**(d) South Asia, Embedded Teacher Training**

*India* has a population of approximately 982.2 million people (16.7% of the world population). With 50% of the population below poverty levels, the country has the largest concentration of poor people in the world. Forty per cent of the population is under 18 years of age. Estimates of the number of disabled people range from 1-10% of the total population.<sup>115</sup> Save The Children reports that between 5-33% of all children in India have impairments.<sup>116</sup> At the same time, a 2001 UNESCO study estimated that 98% of children with disabilities in India remain outside the orbit of any services from the State.<sup>117</sup> Using 393 million (40% of the total population) and an average of 14.5% for disabled children, the number of school-age children with disabilities in India may be as high as 50 million. If children of poverty and those with other forms of disadvantage who may benefit from SEN are added to this estimate, the potential demand and the extent of the unmet need for Special Needs Education is staggering.

From the number of donor-sponsored education projects reported in the literature on India by multi-national organizations and state agencies, it is safe to assume that levels of investment are relatively high. Teacher education and training has been a component of the majority of these projects. An Asian Development Bank report (2002) highlights teacher preparation and training as a central policy in the entire Asia and Pacific Region. This policy recommends two strategies for implementation: restructuring teacher

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<sup>113</sup> G. Roehler (1999) *Agreement for Partnership and Cooperation with Pedagogical University of Honduras*. Toronto: The G. Allan Roehler Institute. As reported in G. Porter (2001) *Disability and Education: Toward an Inclusive Approach*. Inter-American Development Bank., p. 18.

<sup>114</sup> This project was described earlier in this section as an exemplary 'open-system' approach to Inclusive Education.

<sup>115</sup> See the Metts report, p. 67 and the UN 1999 report by ESCAP, p. 83. For a breakdown of numbers by disability and SEN category, see also page 83 of ESCAP (1999) *Asian and Pacific Decade of Disabled Persons: mid-point ~ country perspectives*. New York: UN

<sup>116</sup> Save The Children (2000) Country Report: India 2000. p. 7.

<sup>117</sup> UNESCO (2001). Developing Sustainable Inclusion Policies and Practices. In *Inclusive Schools & Community Support Programmes: Phase II*. P. 80. Paris: UNESCO.

preparation, and continuous staff development.<sup>118</sup> As a priority, these policy/strategies “need to be integrated into any existing instructional policy and strategies for the improvement of schooling” (P. 44).

ESCAP (Economic and Social Commission of Asia and the Pacific) has focused on disability in a flagship program—*The Asian and Pacific Decade of Disabled Persons 1993-2002* and *Agenda for Action* (adopted in 1995 and revised and strengthened in 1999). Education is one of the 12 policy categories in the *Agenda for Action*. An ESCAP Report (2001) -- *Pathfinders: Towards Full Participation and Equality of Persons with Disabilities in the ESCAP Region* -- evaluates the Decade achievements. For this report, ESCAP sponsored a case study of Gujarat in India. This case study describes integrated [inclusive] education in India as “to some extent compelled to emerge rather than developed as an option in a cohesive school system” due to resource constraints.<sup>119</sup>

Both the ADB policies in Asia and the ESCAP experience cited above concerning teacher preparation and training are supported by the 1986 National Policy on Education, and can be described as ‘embedded.’ That is, both agencies view teacher training as necessarily part of the larger context of school reform. Several projects illustrate promising practice with respect to embedded teacher training. These include:

- Teacher Development Initiative (TDI) launched in 1994
- Project Integrated Education for the Disabled (PIED) supported by the UN Childrens Fund
- District Primary Education Program (DPEP) launched in 1994 and sponsored by the World Bank
- Scheme for Integrated Education of Disabled Children (SIEDC)

For all of these projects, training plays a critical role to prepare teachers for Inclusive Education. This review will focus on the TDI Project, *Project Integrated Education for the Disabled* (PIED) as its goals and methods were reported in detail, and the activities exemplify the possibilities of embedded teacher training.<sup>120</sup> The National Council initiated the PIED for Educational Research and Training (NCERT), which is internationally known for support of innovative programs in education. Twenty-two institutions and organizations from all over India collaborated on the project, with the goal of developing IE as an integral part of institutional programs (p. 36). The training was designed in three phases of increasingly intensive development, focused on child-centered teaching and learning strategies, and incorporated practice and feedback sessions. As part of the training, each school prepared its own action research proposal for implementation. Positive effects were documented in terms of changes in teacher and pupil attitudes to teaching and learning, and in pupil achievement (pp. 36-38).

One of the PIED Project’s shortcomings is that it does not address conditions of teachers’ work. By contrast, the SIEDC, implemented through education departments of the government, sets up and equips classrooms with aids and assistive devices, provides allowances for books and stationery, and readers’ allowances for blind children, among other resource supports.

In all of the projects from India listed in this review, the potential opportunity for embedded teacher training and collaboration with Teachers Colleges and University departments of education (both special education and general education) are not documented. Collaboration for embedded teaching at tertiary levels of education could build on the strengths of continuous staff development in PIED, while at the same time begin to address the need for restructuring teacher preparation programs. The current DPEP Project sponsored by The World Bank could build on these experiences to develop a seamless web of preparation and staff development for Inclusive Education.

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<sup>118</sup> D. Chapman & D. Adams (2002). *The Quality of Education: Dimensions and Strategies*. Manila: Asian Development Bank. Pp. 44-45.

<sup>119</sup> ESCAP (2001). *Pathfinders: Towards Full Participation and Equality of Persons with Disabilities in the ESCAP Region*. New York: UN. Pp. 48-49.

<sup>120</sup> N. K. Jangira & A. Ahuja (1994). Teacher Development initiative (TDI) to meet special needs in the classroom. In *Making It Happen*, Paris: OECD.

## Summary

This section reviewed IE promising practices in countries of the South. Because most of the literature focuses on in-country strategies, it is difficult to get an overall picture of the extent to which regions in the South, and the South as a whole are addressing SEN needs. However, the overall picture that emerges from these country reports is one of a focus on increasing access, on teacher training, and on maximizing system efficiency and resource capacity through improved multi-sector coordination and community-based collaboration. As a result, Inclusion has emerged as a dynamic process of participation within a net of relationships. The input-process-outcome-context framework for analysis has attempted to capture the predominant character of IE as a development project in an open-system. While the South faces major challenges in terms of resources and access within the Dakar Framework, creative solutions to meet EFA goals provide opportunities for a way forward. Lessons learned create openings for a refocus on four critical imperatives for success: human rights, decentralization that promotes participation, partnerships for change, and embedded teacher training.

In its *Implementation Handbook for the Convention on the Rights of the Child* (Fully revised Edition, 2002), the Committee on the Rights of the Child expresses concern about disabled children's basic right to education (article 28) and about the low proportion of disabled children enrolled in schools worldwide. The new reporting guidelines for 2002/2003 will require countries to document their progress on several specific activities, including: (i) the disabled child's access to education and the consideration given to their inclusion within the general education system; (ii) measures taken to ensure an effective evaluation of the situation of disabled children, including the development of a system of identification and tracking of disabled children, the assessment of progress, difficulties encountered and targets set for the future; (iii) measures taken to ensure adequate training of those responsible for educating disabled children (p. 321). With this information, a more accurate and detailed picture of overall efforts to address SEN in both the North and South should emerge.

#### IV. Economic Issues: Financing and mobilizing cost-effective resources for Inclusive Education programs

**“We are not the sources of problems. We are the resources that are needed to solve them. We are not expenses, we are investments. We are the children of the world and despite our different backgrounds we share a common reality. We are united in our struggle to make the world a better place for all.”**

*Opening address at the UN Special Session on Children, May 2002. Ms. Gabriela Arrieta (Bolivia) and Ms. Audrey Cheynut (Monaco).*

#### **Introduction/Background**

A review of the literature on Inclusive Education leaves no doubt that financing and support of educational services for students with special needs is a primary concern for all countries, regardless of available resources. Countries of the North are experiencing constraints as well as countries of the South, albeit with vast disparities. In the last decade, countries of the North have experienced widespread economic retrenchment. Tax bases have diminished at the same time that costs have risen dramatically. In these countries, new and expensive medical interventions, combined with expanding social services and welfare benefits, along with an increasing aging population have all increased pressures on spending—resulting in powerful incentives to control education budgets.

At the same time, Countries of the South have also been subject to immense pressures: rapid population growth, increasing poverty, war and disease have destabilized economies and produced strictly limited financial resources. Regardless of relative wealth, education in all countries has had to compete with other economic priorities such as health care, social welfare, and defense budgets. However, education is widely seen as a means to develop human capital, to improve economic performance, and to enhance individual capabilities and choices in order to enjoy freedoms of citizenship. The strategy of Education for All is driven by a clear economic purpose and linked to development.<sup>121</sup>

Within this global context, the Salamanca Statement of 1994 and a growing body of research assert that Inclusive Education is not only cost-efficient, but also cost-effective, and that “equity is the way to excellence” (Skrtic, 1991, OECD, 1999).<sup>122</sup> This research seems to promise increased achievement and performance for all learners (Dyson & Forlin, 1999: 35).<sup>123</sup> Within education, countries are increasingly realizing the inefficiency of multiple systems of administration, organizational structures and services, and the financially unrealistic options of special schools.<sup>124</sup> For example, an OECD report (1994) estimated average costs of SNE segregated placements as 7 to 9 times higher than SEN student placement in general education classrooms.<sup>125</sup>

Despite the common experience of economic pressures and constraints among countries of the North and South, the literature related to economic issues in Inclusive Education takes strongly divergent paths. The plethora of large-scale cross-country studies undertaken by Countries of the North typically

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<sup>121</sup> For a fuller treatment of this issue, see *EFA 2002 Monitoring Report, Chapter One: EFA is Development*.

<sup>122</sup> Skrtic, T.M. (1991). The special education paradox: equity as the way to excellence. *Harvard Educational Review*, 61(2), Pp. 148-206.

<sup>123</sup> Dyson, A. & C. Forlin (1999). An international perspective on inclusion. In *Inclusive Education in action in South Africa*. P. Wengelbrecht et al. (Eds). Pretoria: van Schaik Publishers. Pp. 24-42.

<sup>124</sup> This realization is a common thread in the studies reviewed. Primary sources include OECD, 1994; OECD, 1995; OECD 1999; OECD 2000; O’Toole & McConkey (1995) *Innovations in Developing Countries for People with Disabilities*; EURYDICE, 2003.

<sup>125</sup> This report (page 40) provides a detailed breakdown of average costs across 3 types of placements for 8 countries.

focus on national and municipal government funding formulae for allocation of public monies. In countries of the South, the literature on resource support for inclusive education services focuses instead on building the capacity of communities and parents as significant human resource inputs, and on non-governmental sources of funding. This literature also tends to be case-based on particular countries, regions or programs, rather than large-scale multi-national studies as in the North. Strategies for resourcing Inclusive Education in countries of the South are much more varied and broader in scope—characterized by a focus on linking and coordinating services with health sectors, universities, community based rehabilitation programs and vocational training programs, etc.

It appears that both of these foci (North and South) have something to offer the other. The following sub-section provides a review of various governmental funding models and their relative successes as discussed in the literature. This review is followed by a description of the broader strategies to resource Inclusive Education emanating largely from the South, and ends by encapsulating several common emerging trends in economic strategies. The final sub-section provides an overview of several recommendations that have emerged as robust across the literature in both countries of the North and South.

### **Governmental Funding Formulas**

EFA 2000 Global Assessment reports that worldwide 63% of education costs are covered by governments, 35% by private sector, and 2% by external support.<sup>126</sup> UNESCO (1995) documents special education funding sources in the 63 countries reporting as a mixture of state, voluntary organizations, NGOs and Parents. Forty-percent of countries in this report reported government as the sole source of special education provision. In many developing countries, the state provided all or almost all funding for special education. Voluntary bodies were the major alternative source (e.g., Lesotho, Malawi) and the major source in Uganda.<sup>127</sup>

In an important sense, across countries, the issue of resources appears not so much as an issue of levels of funding, as it is an issue of distribution and allocation of funds. Specifically, fiscal policies and their built-in incentives (or disincentives) for Inclusive Education “may be as important in affecting program provision as the amounts allocated” (Parrish, 2002).<sup>128</sup> Fiscal policies at the government level center around formulaic models that may be categorized in three basic types. Almost all countries in the studies reviewed reported using one or more of these basic types in combination.

#### ***(a) Child-based models***

Child-based funding formulas basically count the number of children identified as having special education needs. Theoretically based on individual need, these models are input models based on demand for services. Input countries with high proportions of students in special schools most often use models, where services are financed by central government on the basis of child counts (EADSNE, 1999). These funds may go to regions or municipalities (1) as a flat grant (equally weighted across all categories of identified students) or (2) as a pupil-weighted scheme, or (3) as a census based count whereby all students are counted and an equal percentage of special needs students is assumed across municipalities. In some cases, adjustments are made to census-based funding based on the socio-economic level of the region. The US government allocates funding to states in this first way; i.e., a flat grant based on child counts submitted by each state. The UK uses a comprehensive age-weighted pupil unit in combination with scales based on severity of disability.

A child based funding model has the advantage of tying funds to individual students. However, it carries several incentives and disincentives. First, a flat grant encourages schools to place students in low

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<sup>126</sup> As reported in R. M. Torres, Instituto Fronesis, May 2000. P. 4. “What Happened at the World Education Forum (Dakar, Senegal, 26-28 April 2000)”

<sup>127</sup> UNESCO (1995) *Review of the Present Situation in Special Needs Education*. Paris: Author.

<sup>128</sup> Parrish, T. (2002). Fiscal Policies in Support of Inclusive Education. In *Whole-School Success and Inclusive Education: Building Partnerships for Learning, Achievement and Accountability*. W. Sailor (Ed). New York: Teachers College Press. Pp. 213-227.

cost programs, which has been reported as an incentive to Inclusive Education. However, costs are high due to the need to diagnose and identify individual students. Extra costs have also been reported related to litigation disputes over identification and placement. All child-based formulas encourage subjective decisions regarding student eligibility for services, which may have either positive or negative affects on Inclusive Education. Some studies report that child-based formulae increase parental power (Pijl & Dyson, 1998; EADSNE, 2003; OECD, 1994). In this respect, it is argued that child-based formulae may be seen as “voucher models” due to the fact that funding follows the child. Parents who have participatory decision-making powers (reported in most countries) will, it is argued, make market-driven choices that enhance school accountability and effectiveness. A particular weakness of the model is the focus on the disability label and not the educational needs, so that the child-count is not a true indicator of actual costs. For example, wide variations and intensity of services may be required by individual students within categories of disability as well as cross categories of disability. Finally, depending on the weighting scheme applied, Inclusive Education may be encouraged or not. Schools might profit by Inclusive Education through increased budgets, or they may be penalized depending on these variations.

The child-based model of funding is the most frequently used, but it has also produced the most negative voices from countries reporting its use. Less integration, more labeling, and a rise in costs are the most frequently cited problems (EADSNE, 1999).

#### ***(b) Resource-based models***

Resource-based models are also known as “through-put” models because funding is based on services provided rather than on child counts. Multi-national studies report an increasing trend away from child-based models toward resourced-based models of funding. Resource-based models are usually accompanied by fiscal policies that mandate qualified units of instruction or programs. For example, in a three-country study of special education funding, Pijl and Dyson (1998)<sup>129</sup> describe a formula in Germany whereby teaches in “integrated” classes are allocated extra time depending on the severity of a students’ disability. Integrated classes must be comprised of 18 ‘regular’ pupils and 2-3 with special needs. In Austria, three types of integration classes are defined and funded: (1) Inclusive Education classes comprised of 20 students (4 of whom have disabilities); (2) small classes; and (3) cooperative classes. In this way, a continuum of services is defined and funded. Several researchers assert that this model contains a built-in incentive to fit students to existing programs, rather than to adapt programs to meet student needs. Further, schools may be penalized for success and rewarded for failure; i.e., those students who experience success no longer need services, and funding is lost.

These reported weaknesses aside, a seventeen-country study (EADSNE, 1999) recommended through-put resource-based funding as the best option, with the caveat that it should be accompanied by some form of output funding (i.e., funds tied to student outcomes). In general, resource-based models encourage local initiatives to develop programs and services, but without some evaluation or monitoring mechanism, there is no incentive to produce quality programs or to seek improvements. Overall, resource-based models are seen as having great potential because funding focuses on teacher resources and support to provide quality education for special needs students.

#### ***(c) Output-based models***

Although all countries in the international studies reviewed recognized the need for accountability and evaluation of programs for cost-effectiveness, almost no country used an output-based model to any great extent. A notable exception is the recent US legislation, No Child Left Behind. This legislation ties funding and school accreditation directly to student achievement scores, with severe economic sanctions for “failure.” It is too soon to know what the economic effects of this legislation will be. In the UK, publication of “league tables” that are essentially report cards of student test scores in individual schools has been tied to increasing numbers of special needs students in segregated settings (Sebba, Thurlow &

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<sup>129</sup> Pijl, S. & A. Dyson (1998) Funding Special Education: a three-country study of demand-oriented models. *Comparative Education*, 34(2). Pp. 261-279.

Goertz, 2000).<sup>130</sup> All researchers predict possible adverse effects for Inclusive Education using this model. They point to the built-in incentive for schools to refer students to special education programs in order to avoid achievement score reporting of students who are behind grade level. Peters (2002) and others (Slee & Weiner, 1998) have also noted that in many instances, output-based models of funding penalize schools for circumstances beyond their control; e.g., high mobility and absentee rates of students, inadequate funding for current textbooks and adapted curriculum materials.<sup>131</sup>

### **Cross-cutting characteristics of funding models**

Several characteristics of funding models are inherent across types. These are described briefly below:

#### ***(a) Decentralization***

All funding models are subject to a parameter described as ‘locus of destination.’<sup>132</sup> A general and widespread trend reported in studies of funding formulae is towards decentralization. Specifically, in decentralization, governments grant monies through block funding to individual localities, schools and/or pupils. These local level authorities then allocate the money determined by local need. Decentralization results in local flexibility and initiatives from the bottom. However, one result widely reported is wide local and regional variations in services, linked to loss of central control over allocations (Gross, 1996)<sup>133</sup>. Further Evans and Gerber (2000) argue that “merely moving allocation decision-making authority closer to the classroom does not appear to be sufficient for securing effective, quality, or even appropriate special education in autonomous or even semi-autonomous schools.”<sup>134</sup> Several researchers argue that, to be effective, decentralization must be accompanied by controls. For example, Thomas, Walker and Webb (1998) argue that a top-down, bottom-up approach is needed. Specifically, initiatives from the bottom (schools) should be accompanied by legal and financial structures from the top that encourage and support Inclusive Education initiatives.<sup>135</sup> Uganda has developed a model that incorporates these recommended approaches and controls. Primary schools in Uganda receive nine monthly payments in fees and capitation grants, and information regarding disbursement must be displayed on all primary school notice boards. In addition, each school’s financing is monitored by a School Finance Committee, which must allocate capitation grants according to a mandated formula: 50% instructional materials, 30% extra-curricular activities, 15% school management (maintenance, water and electricity), and 5% on administration.<sup>136</sup>

#### ***(b) Strategic Behavior***

Meijer, Pijl and Waslander (1999) recommend an “actor approach” as a powerful sociological tool to predict influences of acting entities and their policy contexts.<sup>137</sup> They apply this approach to explain the consequences of particular funding formulas in four European countries. Actors may be individuals, groups or organizations whose behavior is affected by incentives and disincentives. Actors act to maximize

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<sup>130</sup> Sebba, J., Thurlow, M. & M. Goertz (2000). Educational accountability and students with disabilities in the United States and in England and Wales. In *Special Education and School Reform in the United States and Britain*. M. McLaughlin & M. Rouse (Eds). London: Routledge.

<sup>131</sup> Peters, S. (2002) Inclusive education in accelerated and professional development schools: a case-based study of two school reform efforts in the USA. *International Journal of Inclusive Education*. 6(4), Pp. 287-308.

Slee, R. and G. Weiner (1998) *School Effectiveness for Whom? Challenges to the School Effectiveness and School Improvement Movements*. UK: Falmer Press.

<sup>132</sup> EADSNE, 2003

<sup>133</sup> Gross, J. (1996) The weight of parental evidence: Parental advocacy and resource allocation to children with statements of special education needs. *Support for Learning*, 11(1), pp. 3-8.

<sup>134</sup> Evans, J. & M. Gerber (2000). The changing governance of education and its comparative impact on special education in the United Kingdom and the United States. In *Special Education and School Reform in the United States and Britain*. M. McLaughlin & M. Rouse (Eds). London: Routledge.

<sup>135</sup> Thomas, G., Walker, D. & J. Webb (1998). *The Making of the Inclusive School*. London: Routledge.

<sup>136</sup> UNESCO (2001) Including the excluded: Meeting diversity in education. Example from Uganda. In *Combating Exclusion in Education*. Paris: Author. P. 15.

<sup>137</sup> Meijer, C., Pijl, S. J. & S. Waslander (1999) Special Education Funding and Integration: Cases from Europe. In *Funding Special Education*. T. Parrish, J. Chambers & M. Guarino (Eds). Pp. 63-85.

their interests (e.g., job security), minimize effort expended (e.g., avoid bureaucratic paper work). These authors argue that “the link between funding and integration can thus be seen as financial incentives and disincentives that have an impact on a chain of actors, who make their own decisions and act on their own behalf, which results in more or less integration of children with special needs.” All of the three basic funding models have built in incentives and disincentives, with relative degrees of autonomy and decision-making that influence outcomes. Strategic behaviors can never be totally eliminated, but they can be minimized. For example, Bowers and Parrish (2000) suggest a safeguard in the form of formulas that encourage placement neutrality.<sup>138</sup> To achieve placement neutrality, funding authorities must have policies and procedures in place to restrict placements that violate the least restrictive environment requirements and encourage the preference for inclusive education placements.

**(c) Evaluation, monitoring and accountability measures**

A majority of countries in Europe, and states in the United States are currently involved in changing their funding formulas, so that the current situation concerning funding for special needs education can be characterized as in-flux. These changes are motivated by analyses of the incentives and disincentives toward Inclusive Education as noted in the discussion of the three basic models above. While pressures for accountability related to special needs/inclusive education and education in general have increased, few cost-effectiveness studies and/or models for evaluation exist. Four models that do focus on economic efficiency are worth mentioning. Each one focuses on a specific aspect of economic concerns: in-put concerns, throughput concerns, output concerns, and feasibility studies to determine demand.

An exemplary *cost-effectiveness study of outcomes* related to Inclusive Education was conducted by the Centre for Educational Research and Innovation. This study of 8 OECD countries found costs of Inclusive Education and Special Schools comparable (with Inclusive Education costs slightly higher), but pupil academic gains as measured by standardized reading test scores were significantly higher than gains in Special Schools.<sup>139</sup> The study used a ‘production of welfare model’ that examined relationships between resource inputs (staff, building, equipment and other measurable costs) and final outcomes (changes in education status). Intermediate outcomes (e.g., services and their quality) and non-resource inputs (e.g., quality of teacher-pupil relations, school climate/morale) were also included in the cost-effect analysis “as important indicators of school practices and qualities” (p. 335).

A promising evaluation model of *throughput indicators* in Inclusive Education is the UK *Index for Inclusion* developed by Booth and Ainscow. This *Index* was piloted in India (Mumbai and Chennai provinces), South Africa and Brazil as part of a ‘Four Nations Project’ to develop Inclusive Education effectiveness indicators applicable to both countries of the North and of the South. The pilot study met with some success.<sup>140</sup> However, the purpose of the *Index* is to aid schools and communities in developing quality programs (intermediate outcomes), and does not directly address final outcome indicators. Specifically, the process of using the *Index* is designed to contribute to development of effective Inclusive Education programs by supporting internal expertise and capacity-building of teachers and support personnel.

Evaluations of funding formulas constitute *input assessments*. While there is no agreement regarding the efficacy and efficiency of any one funding formula, studies suggest general parameters: (1) formulas should avoid restrictiveness in student placement, and (2) funding should provide ‘seamless’ services toward Education for All (i.e., use a whole-school approach and blend funding support between special education and general education programs). In the US, states reporting the most success emphasize dollar incentives for Inclusive Education, for a comprehensive system of professional development, and for on-going technical support to schools (Bowers & Parrish, 2000). Parrish (2002) has developed the

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<sup>138</sup> Bowers, T. & T. Parrish (2000). Funding of special education in the United States and England and Wales. *Special Education and School Reform in the United States and Britain*. London: Routledge. Pp. 167-193.

<sup>139</sup> Beecham, J. & M. Knapp (1999). *Inclusive and Special Education: Issues of Cost-Effectiveness*. In *Inclusive Education at Work: Students with Disabilities in Mainstream Schools*. Paris: OECD.

<sup>140</sup> Booth, T. & K. Black-Hawkins (2001) *Developing Learning and Participation in Countries of the South: The role of an Index for Inclusion*. Paris: UNESCO.

following criteria for evaluating the effectiveness and efficiency of funding formulas.<sup>141</sup> These criteria are representative of recommendations from across the literature.

**Criteria for Evaluating Special Education Funding Formulas**<sup>142</sup>

Equity	Student, school, and regional levels
Adequacy	appropriate minimum levels
Predictability	stable levels of funding
Flexibility	latitude to deal with local conditions
Identification Neutral	students do not have to be labeled to receive services
Reasonable reporting burden	costs of administration minimized
Fiscal Accountability	procedures contain excessive or inappropriate costs
Cost-Based	funding linked to actual costs for services
Cost-Control	patterns of growth are stabilized
Placement neutral	funding is not based on type of placement or disability label
Outcome Accountability	monitoring is based on various measures of student outcomes (including progress towards goals).
Connection to General Ed Funding	formula should have a clear conceptual link to integrated education an services
Political Acceptability	education and services implementation involves no major disruption of existing services

A fourth category of evaluation pertinent to economic issues is *feasibility studies*. An exemplary study conducted by Save The Children (co-sponsored with several donor agencies) selected 10 pilot schools in Lesotho to determine the feasibility of introducing Inclusive Education. Baseline data was collected over six months on: (1) numbers and types of students with disabilities, (2) level of teacher skills, (3) dispositions of parents, students, and teachers towards Inclusive Education; (4) physical conditions of schools. Results of the study indicated feasibility but also highlighted several barriers: lack of resources, no books or equipment, contradictory policies, no guidelines on implementation. This information was utilized to focus implementation efforts on (1) developing curriculum materials and training in their use, (2) piloting the material and integrating children in the 10 pilot schools, (3) development of a parent-training manual, (4) on-going awareness-raising at all levels, and (5) integration of the curriculum into the National Teacher Training curricula.<sup>143</sup>

<sup>141</sup> Parrish, T. (2002). Fiscal Policies in Support of Inclusive Education. In *Whole-School Success and Inclusive Education*. W. Sailor (Ed). New York: Teachers College Press. Pp. 213-227.

<sup>142</sup> Adapted from Table 13.1 on pages 22-23 of Parrish, 2002.

<sup>143</sup> Pholoho, K., Mariga, L., Phachaka, L. & S., Stubbs (1995). Schools for All: National Planning in Lesotho. In *Innovations in Developing Countries for People with Disabilities*. Pp. 135-160 England: Lisieux Hall.

## **Cost-Saving Measures to Resource Inclusive Education**

Scarce resources in developing countries have produced a number of cost-effective initiatives to promote Inclusive Education. Further, while school-as-a-whole strategies dominate economic reform efforts in countries of the North, community-as-a-whole efforts characterize economizing initiatives in the South. Coupled with these initiatives in the South, is the goal that education should prepare individuals with disabilities to live and to work in their communities.<sup>144</sup> From this perspective, education involves more than schooling and scores on achievement tests (based on concepts of individual needs/charity model). Education is seen as a development opportunity with emphasis on outcomes across the life-span; i.e., based on concepts of human dignity, productivity, and quality of life. Development as a core principle and goal of education necessarily “begins at the level where people and communities already are and seeks to utilize existing skills and capacities (C. McIvor, *The work of Save the Children in Morocco*, p. 96). This broad view of education demands and depends on an inclusive society as well as an inclusive education system. Consequently, strategies for developing and supporting inclusive education draw from a broad range of resources—both internal and external to schools. The following strategies and examples highlight some of these cost-saving measures.

### **(a) *Teacher training and professional development strategies***

Personnel costs constitute the bulk of funding needs in education. Teachers and their skills in pedagogy and curriculum development are also key indicators for successful pupil outcomes and quality programs. Much of the cost-saving efforts focus in this area. Several strategies related to teacher training provide exemplars in this area. First, countries ***utilize the expertise of people with disabilities*** to train teachers. Mozambique taps deaf adults as teachers of the Deaf. These adults teach small classes of deaf children in Maputo, where severe teacher shortages exist. Papua New Guinea involved deaf adults in provision of services and to garner support for Inclusive Education at the community level. Second, a ***trainer of trainers model*** provides cost-savings and is used in many countries of the North and South. In Latin America, a regional training strategy called a “cascade model” involved 28 countries. First, 2 specialists per country were trained in special education need. These specialists trained an additional 30 in each country, until 3000 were ultimately trained.<sup>145</sup> In Honduras, the Partner of America Program employed a similar strategy with significant cost-savings.<sup>146</sup> Another strategy Costa Rica found cost effective and responsive to their severe teacher shortage was to provide in-service training to general education teachers and pay them extra hours for teaching additional classes for special education needs students. These classes were offered after school as a supplemental support to the children’s participation in regular morning classes.<sup>147</sup> Papua New Guinea also focused efforts on general education teacher training, with support from adults with disabilities as role models in classrooms.

**(b) *Pre-service training strategies*** also produce cost-savings. Until recently, Botswana had relied on outside countries for training special educators. In 1994, the government produced a Revised National Policy of education. The first major step was to localize training by including special education needs curricula in teachers colleges throughout the country, producing cadres of skilled teachers.<sup>148</sup> In Malta, as in many countries, support for training originated with NGOs. The Eden Foundation linked its services to the University of Malta to develop a Program for Inclusive Education with the Dept. of Psychology, Faculty of Education. Through combined efforts, this arrangement led to two achievements: a landmark

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<sup>144</sup> Engelbrecht, P., Howell, C. & D. Bassett. (2002) Educational Reform and the Delivery of Transition Services in South Africa: Vision, Reform, and Change. *Career Development for Exceptional Individuals*, 25(1), Pp. 59-72

<sup>145</sup> UNESCO (1995c). Las necesidades educativas especiales. Conjunto de materiales para la formación de profesores. París, UNESCO

<sup>146</sup> McNeil, M., Villa, R. & J. Thousand (1995). Enhancing Special Education Teacher Education in Honduras: An International Cooperation Model. In *Special Education in Latin America: Experiences and Issues*. A. Artiles & D. Hallahan (Eds). London: Praeger. Pp. 209-230.

<sup>147</sup> Stough, L. (2002) Teaching Special Education in Costa Rica. *Teaching Exceptional Children*, 34(5), pp. 34-39.

<sup>148</sup> Abosi, O. (2000). Trends and Issues in Special Education in Botswana. *Journal of Special Education*, 34(1). Pp. 48-53

Equal Opportunities for Persons with Disabilities law enacted by Parliament in January 2000, and a National Commission for Persons with Disabilities to monitor discrimination in education and employment.<sup>149</sup> In Guatemala, university professors supervise their students in clinical experiences that provide outreach psychological services to students with disabilities. Parents benefit from the free cost of treatment, the child benefits from acceleration of treatment, and the pre-service psychologists benefit from direct clinical experience.

(c) Another cost-saving strategy involves *centralized resource centers, outreach programs and cooperatives*. First, special schools are converted to resource centers and the staff in these schools provides outreach and technical support to general education teachers in primary/secondary schools. Similarly, the UK has evolved special provision schools —schools with expertise in Inclusive Education that provide support to cluster schools. Several countries in Europe as well as the United States and Canada have also adopted this model. In Bangladesh, the cluster approach is used to provide in-service education of teachers through *upazila* resource centers.<sup>150</sup> South Africa uses the model to reach out to rural areas. In India, The Divine Light Trust converted its special school for blind individuals into an outreach and resource centre. The Centre trains teachers in mainstream schools to integrate blind children. In this way, networks have been established throughout India.<sup>151</sup> In Guatemala, clinical staff take to the streets, parks, shopping centers, and special events in a modular resource program serving street children with behavioral disorders.<sup>152</sup> In India, project PREPARE was set up in 1983, initially to respond to natural disaster. From initially training people to survive, it then began training villagers in community health, progressing to social mobilization around women’s issues. In 1988, ADD India began providing disability training to the organization’s cadres to develop sanghams. Sanghams “mobilize disabled people to take action on their own behalf, and to use existing structures to secure services and benefits” (Coleridge, 1996: 164).<sup>153</sup> Through sanghams, disabled people apply for loans, reduced-cost bus passes, and scholarships for school children. The costs of training are extremely low, amounting to salaries and travel expenses for three field staff. The founder of ADD says, “Social action is so cheap! For the price of one salary we have seen the formation of groups in 44 villages. Hundreds of disabled people are finding a new purpose in life, and community attitudes are changing” (p. 167).

(d) Building on the strengths and motivations of *parents* to mobilize resources for Inclusive Education is another key cost-saving strategy commonly capitalized on. Jamaica developed an Early Intervention Project for children with disabilities that is home-based, relies on parents to provide services to the children after initial training. Follow-up visits to parents provide on-going support. The cost is US\$300 per year per child per year, which is considerably less than the cost of special education in Jamaica. The program caters to very low-income groups in poor and overcrowded homes, who have only female adults in the household. Mothers are provided with toys and educational materials and taught motor development and stimulation techniques for their disabled children.<sup>154</sup>

(e) *Children* constitute an underutilized resource in schools. Peer tutoring programs have emerged in the US and elsewhere and have shown great promise for providing cost-savings as well as being effective in accelerating the academic progress of both those being tutored and the tutors themselves. A multi-national Child-to-Child Program was initiated by the Child-to-Child Trust in 1978. The basic principle of child-to-child support is “faith in the power of children to communicate health messages and practices to

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<sup>149</sup> Bartolo, P. (2001). Recent developments in inclusive education in Malta. *Mediterranean Journal of Educational Studies*, 6(2). Pp. 65-91.

<sup>150</sup> J. Lynch (2001) *Inclusion in Education: The Participation of Disabled Learners*. Paris: UNESCO

<sup>151</sup> For details of this project in India, refer to Lansdown, *It's Our World Too!* (2001).

<sup>152</sup> Aguilar, G. (1995). The Modular Resource Model: An Integrated Consultation System for the Treatment of Children with Behavioral Disorders in Guatemala. In *Special Education in Latin America*. A. Artiles & D. Hallahan (Eds). London: Praeger. Pp. 191-208.

<sup>153</sup> Coleridge, P. (1996) India: social action in a highly complex society. *Disability, Liberation and Development*. UK: OXFAM.

<sup>154</sup> Thorborn, M. (1995). Community-Based Early Intervention in Jamaica: A Home-Based Model Incorporating Parents of Children with Disabilities. In *Special Education in Latin America*. A. Artiles & D. Hallahan (Eds). London: Praeger. Pp. 61-72.

younger children, peers, families and communities.”<sup>155</sup> In 1999, Child-to-Child Trust developed a 3-week course on *Child-to-Child Inclusive Education*. The course was first offered to 21 participants from 12 countries including Ethiopia, Bangladesh, Laos and Nicaragua. A Child-to-Child project in Zambia called *Twinning for Inclusion* involved 16 primary schools. Non-disabled students were peered with disabled students to support each other within their schools and communities. Learning through experience, ‘twins’ in these schools “conduct their own surveys and experiments to discover answers for themselves. The aim was to encourage independence by creating an environment in which children learn to work together and help each other.” (EENET, 1999 p. 8). Child-to-child programs are documented elsewhere in international literature (Bonati and Hawes, 1992; Hawes, 1988, Kisanji, 1999). These programs build on the common experiences of children in extended families, and are a natural extension of cultural practices at home. Cost-benefits to teachers, who often experience classes with high pupil-teacher ratios are also inherent in this model.

**(f) Community-based Rehabilitation Programs**

According to EFA 2000 Global Assessment, half of the developing countries supplying information reported spending less than 1.7 of their GNP on basic education in 1998.<sup>156</sup> Given that governments on average provide little more than half of the funding for education budgets, community-based programs constitute a significant potential source of resources for Inclusive Education. The Community Based Rehabilitation (CBR) movement began at least two decades ago to improve disabled people’s lives through enabling access to health and rehabilitation (employment) services. Beginning at about mid 1990s, CBRs began to shift their focus and broaden their scope. The focus shifted from ‘treating’ the individual, to communities and environments. Now, many CBRs provide an array of services aimed at creating inclusive communities. The concept of Inclusive Communities puts the focus on the community. “The community looks at itself and considers how policies, laws, and common practices affect all citizens. The community takes responsibility for tackling existing barriers to participation of disabled children, men and women.”<sup>157</sup> The new concept of CBR now includes as one of its central principles, participation of disabled people and Disabled Peoples’ Organizations (DPOs). Participation must take place at all stages of planning, development, implementation, evaluation and decision-making.

Kisanji (1999)<sup>158</sup> argues that in essence, CBR has become an education program, and that it is not possible to separate education from development. In his paper he discusses links between CBR and Inclusive Education in Schools and provides examples of some initiatives in this area. In Kenya, for example, itinerant CBR workers conduct an “open education” program in rural areas. These workers visit blind children in their homes and work with the parents to provide early stimulation activities that will assist them in entering school. The workers also provide Braille lessons in schools, and attend teacher staff meetings to assist in planning and curriculum adaptation. Tanzania uses a similar model of itinerant CBR workers in schools, funded by the Tanzanian Society for the Blind. An itinerant program in Vietnam provides another example of linking CBR and Inclusive Education: a program co-sponsored by Health and Education services sectors provides CBR workers who work with teachers to make low cost rehabilitation aids for disabled pupils in classrooms, and to conduct joint surveys to identify SEN student needs. The CBR workers also provide home-learning for those children who are not able to attend school.<sup>159</sup> Coordination between CBR and Inclusive Education has several cost-saving advantages: it alleviates the severe teacher shortages, gives confidence to regular classroom teachers to devise ways of meeting children’s learning needs.

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<sup>155</sup> EENET-Enabling Education (1999). P. 8, Issue 3, May 1999. For more details of this project and other cost-saving initiatives, Save The Children, *Guidelines for Inclusive Education* (2001) has one of the most comprehensive reviews.

<sup>156</sup> As reported in Torres, 2002.

<sup>157</sup> ILO, UNESCO, UNICEF, WHO (2002). A joint position paper entitled “Community-Based Rehabilitation CBR for and with People with Disabilities.” Found at [www.disability.dk](http://www.disability.dk)

<sup>158</sup> Kisanji, J. (1999). Models of Inclusive Education: Where do community based support programmes fit in? Paper presented at the Workshop on “Inclusive Education in Namibia: The Challenge for Teacher Education,” 24-25 March 1999. Rossing Foundation, Khomasdal, Windhoek, Namibia.

<sup>159</sup> EENET-Enabling Network. P. 5, October 1998.

On a larger scale, in 1997, UNESCO launched its Inclusive Schools and Community Support Programmes through a Global Project to maximize human and material resources in support of Inclusive Education. The Global Project has just completed Phase II. So far, a worldwide cross-section of 30 countries have been involved. Based on applications submitted from countries that were committed to developing sustainable Inclusive Education programs, UNESCO selected 4 countries for this focus. As one of the countries, India began a pilot project in primary and secondary schools Mumbai and Chennai. It is too soon to evaluate its effectiveness, as it is in its early stages. However, some cost-saving measures included training of CBR workers in support of the project. From UNESCO's experiences in Phase I and Phase II, general lessons learned were that introducing Inclusive Education as an innovation is a process and not an event. The report recommends 1-2 years for development of an initiative, and to expect delayed impact.

Linking community-based-resources, government entities, and schools faces enormous challenges. The India project discovered that a major task must be to advocate and disseminate information to government ministries and agencies. The Joint Position Paper from ILO, UNICEF, UNESCO and WHO makes these further specific recommendations for sustainable CBR Programs:

- CBR programs must be based on a human rights approach
- The community must be mobilized to respond to the needs of the target population
- Resources and support must be provided
- Multi-sectoral collaboration must take place, including collaboration with DPOs and NGOs
- Community Workers play a key role in implementation
- CBRs should be integrated with government Ministries, with allocation of adequate resources.

Finally, a World Summit for Social Development was held March 1995 in Copenhagen. At this Summit, international NGOs of Disabled People called for 'Partnerships for Progress.' This action plan echoes many of the recommendations of the Joint Position Paper. These strategies are also clearly supported in UN Standard Rule #6 on education.

### **Summary**

Faced with severe financial constraints and pressures, countries of the North and South have developed several cost-saving measures to develop and implement Inclusive Education. Funding formulas have come under scrutiny, and major reforms are underway to support Inclusive Education as a cost-effective means to achieve EFA. Human resources and community support programs constitute significant contributions that are both cost-effective and cost-efficient. All economic activities, however, depend on clear policy directives and a legal framework.

## V. Legal Issues: Progress towards the right to Inclusive Education

**“Nothing about us without us”**  
(Disability policy of DPOs, South Africa)

**“States Parties shall respect and ensure the rights set forth in the present Convention to each child within their jurisdiction without discrimination of any kind, irrespective of the child’s or his or her parent’s or legal guardians’ race, color, sex, language, religion, political or other opinion, national, ethnic or social origin, property, disability, birth or other status.”**

Convention on the Rights of the Child, 1990, Article 2

### **Introduction**

This review of legal issues pertaining to Inclusive Education has relied substantially on reports emanating from international organizations, and reports commissioned by these organizations as well as independent external reports. A balance was attempted between reports by international organizations *for disabled people*, and reports by international organizations *of disabled people*. The section begins by providing a brief historical background, followed by discussion of the current situation regarding the rights of disabled people in relation to pertinent international conventions, resolutions and declarations. It is not possible to provide more than an acknowledgment of their relevance and impact in this review. The reader may refer to Annex 2 for primary sources to obtain more details. These conventions, etc., provide a global context for the next sub-section, which describes general legislative progress toward Inclusive Education at the country-level. The final sub-section highlights specific issues related to promoting rights to Inclusive Education that derive from the review.

### **Background**

The importance of legal issues cannot be underestimated. Most policy documents on Inclusive Education begin with the recommendation that a policy framework and legislative support must be in place to ensure access to and equal participation in Inclusive Education programs. The literature also makes clear that the impetus for Inclusive Education has been put on the agenda and propelled forward by Disabled Peoples Organizations. DPOs have achieved this agenda through organized political pressure and mobilizing allies. As a result, progress towards Inclusive Education has been slow but steady over the last twenty-five years. For example, an historical analysis of key international policy documents conducted by Peters (unpublished manuscript)<sup>160</sup> provides evidence of a definitive conceptual shift in thinking. The UN Declaration of Rights (1975) focused on assisting the ‘disabled individual’ to develop abilities, capabilities and self-reliance for functioning in ‘normal’ life. In contrast, the Dakar Final Report on EFA progress since Jomtien (2000) states: “Concern about inclusion has evolved from a struggle in behalf of children ‘having special needs’ into one that challenges all exclusionary policies and practices in education....Instead of focusing on preparing children to fit into existing schools, the new emphasis focuses on preparing schools so that they can deliberately reach out to all children.”<sup>161</sup>

Since 1999 momentum for disability rights has grown exponentially. In 2001, the UN Commission on Human Rights (UNCHR) passed resolution 2000/51 on Human Rights of People with Disabilities. The UNCHR sets out a number of specific procedures whereby states must improve rights of disabled people,

<sup>160</sup> Peters, S. (Unpublished manuscript). “Addressing the Rights of Individuals with Disabilities in Relation to ‘Education for All’: Where do we stand? What do we know? What can we do?” Submitted to *International Journal of Disability, Development and Education*. Notification pending.

<sup>161</sup> UNESCO (2000) *World Education Forum Final Report. Part II: Improving the quality and equity of education for all*. Subsection entitled “Meeting special and diverse education needs: making inclusive education a reality”. Pp. 16-21.

including those regarding Inclusive Education<sup>162</sup>. Subsequent to resolution 2000/51, the UNCHR published a comprehensive review of the current use and future potential of six international human rights instruments in the context of disability.<sup>163</sup> These instruments are:

- International Covenant on Civil and Political Rights (1966)
- International Convention on the Elimination of All Forms of Racial Discrimination (1969)
- International Covenant on Economic, Social and Cultural Rights (1976)
- Convention on the Elimination of all Forms of Discrimination against Women (1981)
- Convention against Torture and Other Cruel, Inhuman or Degrading Treatment or Punishment (1984)
- Convention on the Rights of the Child (1990)

Within the past decade, several World Congresses have passed resolutions and declarations with relevance to Inclusive Education. Among them:

- The Declaration of Managua (1993)
- The Inter-American Convention to Eliminate All Forms of Discrimination Against Persons with Disabilities (1999)
- The 1999 Declaration of the African Seminar on Development, Cooperation, Disability and Human Rights (established the Pan-African Decade of Disabled People 2000-2009)
- The Beijing Declaration on Rights of People with Disabilities in the New Century 2000 The Declaration of Quebec (2001)
- The 2001 African, Caribbean and Pacific-European Union resolution on Rights of Disabled People and Older People in ACP Countries.
- Disability Rights-A Global Concern Conference. London, 2001
- The Declaration of the 2002 World Assembly in Sapporo
- The Declaration of Biwako (2002)
- The G-8 Commitment to Inclusion (2002)
- The European Year of Disabled Persons (2003)
- The Cochin Declaration (2003)

Several of these Declarations call for the United Nations to constitute a special convention on the Rights of Disabled People. Concerted global efforts led by international DPOs are currently underway to make this convention a reality. The International Disability Alliance (IDA), a consortium of international DPOs, has passed a resolution outlining critical points pertaining to this proposed convention.<sup>164</sup>

Despite these successes, gaps remain. The EFA Global Monitoring report just released (2002) is silent on disability issues and makes no mention of progress toward Inclusive Education for children and youth with disabilities and special education needs. Perhaps this is why the Flagship on EFA and Rights of Persons with Disabilities established as one of its strategic objectives: “Seek to ensure that the EFA monitoring Process includes specific quantitative and qualitative statistics and indicators related to persons with disabilities and documentation of resources allocated to the implementation of EFA for these individuals.”<sup>165</sup> The following section seeks to fill in some of these gaps.

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<sup>162</sup> Specifics of the resolution are available at [www.unhchr.ch](http://www.unhchr.ch)

<sup>163</sup> Quinn, G., Degener, T. (2002) *Human Rights and Disability*. New York & Geneva: OHCHR

<sup>164</sup> IDA is a consortium of international DPOs: Disabled Peoples' International, Inclusion International, Rehabilitation International, World Blind Union, World Federation of the Deaf, World Federation of the Deaf-Blind, World Network of Users and Survivors of Psychiatry. For a full text of the IDA resolution, see [www.dpi.org/IDA/pdf](http://www.dpi.org/IDA/pdf)

<sup>165</sup> (UNESCO) 2003. *The Flagship on Education for All and the Rights of Persons with Disabilities: Towards Inclusion*. EFA web-site: [www.unesco.org/education/efa](http://www.unesco.org/education/efa). Several Flagships on special issues were recently formed as a result of recommendations from an EFA Task Force. Details are in “EFA: An international strategy to put the Dakar Framework for Action on EFA into operation” (2002).

### **The Current situation: Conventions, Declarations and Standard Rules**

In 1993, the United Nations General Assembly adopted the Standard Rules on Equalization of Opportunities for Persons with Disabilities. Standard Number 6 is pertinent to this review. This rule states in part (6.1):

***UN Standard Rules on Equalization of Opportunities for Persons with Disabilities. Standard Rule #6.1***

“General education authorities are responsible for the education of persons with disabilities in integrated settings. Education for persons with disabilities should form an integral part of national educational planning, curriculum development and school organization.”

Section 6.8 of this rule states that special education may be considered, however it should be aimed at preparing students for education in the general school system, and the quality of such education should reflect the same standards as general education and should be clearly linked to it. Further, the rule states that “states should aim for the gradual integration of special education services into mainstream education.” This standard rule is one of the most comprehensive international standards for Inclusive Education that exists. (The other is the Salamanca Statement of 1994 described in Section 1 of this report).

In 1994, the United Nations Commission for Social Development undertook a three-year study to monitor the progress in developing national policies and programs built on these Rules. A commissioned report, produced in 1997, analyzed findings from 83 member states responding to their survey (45% of member states) and 163 NGO members (27% of member organizations). Question number six of the survey asked countries and NGOs to report whether or not they had legislation/policies pertaining to education for persons with disabilities. Only 12.5% (ten countries) and 6% (8 NGOs) reported no legislation or policy. Concerned with the validity of reporting from governments and NGOs for disabled people, member organizations of Disabled People’s International conducted their own independent study using the same survey questions. However, they targeted DPOs as respondents. Of 33 country respondents (representing all regions), DPOs reported 11.5% without specific legislation or policies concerning education for people with disabilities. While the results are encouraging, and the DPI study converges with UN study findings in relation to education, several caveats are provided. Primarily, findings do not provide details of the quality, extent, or impact of the legislation and NGO policies. Further, existence of legislation/policies does not indicate the ability and success with respect to implementing them. It is also important to recognize that Inclusive Education is distinctly interrelated with several other standard rules; e.g., those on, accessibility, rehabilitation and support services. In these areas, compliance is lower. The general findings of both the UN commissioned report and the DPI study are discouraging, and report that conformity has been established, but only to a low degree.<sup>166</sup>

It is important to distinguish between conventions and declarations. As a declaration, the UN Standard Rules are not legally binding on member states. Declarations (including the Salamanca Statement of 1994) express the standpoint of the international community, and although not legally binding, represent important moral and political commitments. However, according to Michailakis (1997), the Standard Rules have achieved “customary law” status through legislation conforming to these rules in a significant number of countries. Conventions, on the other hand, do constitute binding international law on the governments that ratify them. The United Nations Convention on the Rights of the Child (UNCRC) is a convention that is legally binding in this way. This convention was ratified in 1995 by all member states except the US and Somalia. The UNCRC is one of very few conventions to specifically site disability as the subject of discrimination. Article 2 and 23 of this convention pertain to Inclusive Education for children

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<sup>166</sup> Michailakis, D. (1997) *Government Action on Disability Policy: A Global Survey*. Commissioned by the Office of the United National Special Rapporteur on Disability. Also, *Government Implementation of the Standard Rules as seen by Member Organizations of Disabled Peoples’ International-DPI*. [www.independentliving.org/standardrules](http://www.independentliving.org/standardrules)

and youth with disabilities. Article 2 is cited at the beginning of this section. Article 23 has been strongly challenged by DPOs because its wording makes rights contingent on ‘available resources.’<sup>167</sup>

In 1999, another international DPO—*Swedish Organizations of Disabled Persons International Aid Association (SHIA)* commissioned a study of the UN Universal Declaration of Human Rights. The study was conducted by the *SHIA Human Rights and Disability Network* which constitutes DPOs from the North, South and East. Article 26 of this declaration pertains to education. Overall findings were considered “beneath contempt.” In the area of education, the report highlights examples from Tanzania, Uganda and countries of Central and South America. For example in Central and South America, evidence of theoretical opportunities for Inclusive Education existed, but in most cases the actuality was ruled out because of physical access and curriculum barriers.<sup>168</sup>

Also in 1999, *Disability Awareness in Action (DAA)* launched its *Human Rights Data Base*. This database is one of two systematic attempts to provide an international record of human rights abuse directed at people with disabilities.<sup>169</sup> DAA is a collaborative among DPI, IMPACT, Inclusion International and World Federation for the Deaf. Violations are categorized according to the 30 Articles contained in the UN Universal Declaration of Human Rights. With respect to violation of rights pertaining to education and disabled persons, the DAA has collected 118 documented cases affecting 768,205 people in 67 countries (including the fast-track countries of Bolivia, Gambia, Ghana, Guyana, Honduras, India, Tanzania, Uganda and Zambia). DAAs database includes testimony invited for submission to the UN Human Rights Commission as part of its Global Rights Campaign. The number of violations in the area of education constitutes the sixth largest category of the 30 articles.<sup>170</sup>

In May 2002, a *UN Special Session on Children* set millennium development goals of the UNCRC, including the goal to ensure that every boy and girl complete a full course of primary education. In setting out these goals and strategies to meet them, disabled children and youth are not specifically cited except as part of goal 37.10 (strengthen early childhood services by providing support to parents with disabilities) and part of strategy 40.2 (promote the search and identification of children with special needs and disabilities). The signatory states are urged to have action plans in place to address these goals and strategies by the end of 2003.<sup>171</sup>

In June 2002, the Committee on the Rights of the Child published a new fully revised edition of the CRC implementation guidelines. This new edition contains a special section on disabled children and Inclusive Education. In this section, the Committee indicates that it has gone beyond a general concern for disabled children’s right to education, to “emphasize the importance of the right to full inclusion in regular schools. And the Guidelines for Periodic Reports specifically asks for information on inclusion in schools and other institutions—para 92.”

Overall, review of the current situation with respect to education rights for people with disabilities shows some progress with respect to international law and conventions. Several reports provide some basic information concerning rights of persons with disabilities. Largely collected by international DPOs, these

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<sup>167</sup> This contingency has allowed states a large degree of discretion concerning allocation of resources to Special Needs Education. Realizing the declining situation, the Committee on the Rights of the Child addressed this issue in its new 2002 revised guidelines for CRC implementation. Specifically, the new guidelines state: “when considering the allocation of resources to children, special attention should be paid to the needs of disabled children.” P. 334

<sup>168</sup> Akerberg, A. (2001) *Human rights and persons with disabilities. A Report from the SHIA Human Rights & Disability Network*. Stockholm: SHIA ([www.shia.se](http://www.shia.se))

<sup>169</sup> Leandro Despouy, a Special Rapporteur of the UN Sub-Commission on Discrimination and Protection of Minorities, prepared an earlier 1993 report. The Despouy report (entitled *Human Rights and Disability*) documents widespread human rights abuses in the area of disability and chronicles a number of these abuses as causes of disability. The UNCHR and the UN General Assembly endorsed his report.

<sup>170</sup> Light, Richard (2002). *A Real Horror Story: The Abuse of Disabled People’s Human Rights*. England: Disability Awareness in Action.

<sup>171</sup> UNESCO (2002). *A World Fit for Children*. Paris: UNESCO.

DPO and commissioned studies show that legislation pertaining to Inclusive Education appears to be in place in majority of countries reporting. However, the extent to which services are implemented, and the extent to which children and youth have access to them is not known. Further, the UNCRC goals for the new millennium are inclusive of those with special needs, but gaps in safeguards and monitoring strategies exist. The new Flagship on EFA and Rights of Persons with Disabilities will work on this gap as a strategic objective. The data gathered on children and youth with special education needs and disabilities will be critical to future planning. One indication of a growing need is the comparative data collected on children in school and children with no access to school. In 1990 (Jomtien) there were 599 million children in school as compared to 681 in 2000 (Dakar). At the same time, the number of children reported with no access to school grew from 106 million to 117 million.<sup>172</sup> Many SEN and disabled children and youth are likely to be in this latter category. The data that do exist, combined with the lack of a comprehensive international convention to protect the rights of disabled people, are two significant reasons DPOs are urging a UN Special Convention.

### **Legislative/Policy Progress Toward Inclusive Education**

UNESCO conducted a study of UN member states with regard to SEN legislation (1996). This study is one of two comprehensive reports of its kind in the literature. In this study, 52 UN member states responded to a questionnaire survey. Data from the study are summarized below<sup>173</sup>:

1. SNE is an explicit constitutional right in 15% (8) countries.
2. 92% (47) countries report legislation pertaining to SNE.
3. In terms of identification and assessment, 46% involve parents and 42% use an inter-disciplinary approach.
4. SNE is available at the pre-primary level in 42% of the countries reporting; 85% at the primary level; 80% at the secondary level, and 17% at the university level.
5. 44% reported mandatory “pedagogic integration” (inclusive education)
6. Regular curriculum adapted for SEN is available in 42% (27) countries; 23% provide special education curriculum.
7. Only 11% of countries reporting have provisions for monitoring students’ progress.
8. Vocational education for SEN students is offered in 24 countries reporting (63%).

The second comprehensive report, *Review of the Present Situation in Special Needs Education* (1995)<sup>174</sup> provides more detail regarding policy statements. Information from 63 countries was obtained, with great variations in detail provided. Several trends were reported. The most common policy strand specified developing individual’s optimum potential, with a presumption in favor of integration. Policies on integration were almost universal—up from 75% in 1986. The second strand within policy statements addressed underlying principles; e.g., normalization (Scandinavian countries), democratization (Bahrain). The third strand identified aspects of an appropriate education. Zimbabwe’s policy was the most comprehensive, and included: early detection and intervention, integration, development of local training facilities, procurement of equipment, development of resource centers, provision of support and monitoring services, and assistance for non-governmental organizations (Page 10). Finally, most countries’ policies acknowledged the importance of including parents in decision-making, but did not give parents the absolute right to choose services.

UNESCO’s 1995 report provides additional information regarding administrative and organizational structures that monitor legislation and policy documents. Nine-six per cent of countries reported responsibility resided with the national Ministry of Education, either sole responsibility (38%) or shared responsibility (58%). When responsibility for special education provision was shared, the most common were the Ministries of Health, Social Welfare and Human Development. These ministries often

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<sup>172</sup> Sources are UNICEF (1990) the *Final Report, World Conference on EFA*; and UNESCO (2000) *EFA FORUM Statistical Document, World Education Forum Dakar* as reported in Torres, R. M. (2000) “What Happened at the World Education Forum?” Page 4. [www.campaignforeducation.org](http://www.campaignforeducation.org)

<sup>173</sup> UNESCO (1996). *Legislation Pertaining to Special Needs Education*.

<sup>174</sup> UNESCO (1995). *Review of the Present Situation in Special Needs Education*. Paris: Author.

assumed responsibility for particular aspects of special education provision. For example, Ministries of Health often assumed responsibility for assessment and referral activities. Analysis revealed a trend toward administrative integration of general education and special education under the same regulatory framework. A trend toward decentralization was also evident, particularly in larger countries, where administration devolved to regional levels, with national oversight. In some about 25% of countries reporting, the voluntary sector provided special education services subject to ministerial supervision and monitoring.

Overall, these data should be interpreted with extreme caution. First, current data is not available, and most countries have proposed legislative reforms, particularly in the area of SNE in regular schools. Second, Legislation and policy concerning Inclusive Education must be evaluated in the context of progress toward implementation as well as the effectiveness of monitoring and evaluation. For example, commenting on the situation in Ghana, Avoke (2002)<sup>175</sup> states: “The impression created from official government circles is that there is a tendency towards inclusive educational policies, but the irony (from a practical viewpoint) is an apparent increase in residential schools and the continuing placement of children with learning difficulties in segregated settings: a situation indicating that medical influences remain pervasive.”

### **Promoting Rights to Inclusive Education**

From the literature, recommendations proposed by three groups have been selected as representative of proposals to address the rights of children and youth with disabilities and those with special education needs. The groups represent a range of voices of, by, and for disabled people and marginalized groups in society.

The *Expert Group meeting on International Norms and Standards Relating to Disability (1998)* promulgated detailed specific strategies for implementation at national and international levels. At the national level, several of these could have a significant impact on Inclusive Education. One specific strategy, ‘inclusion, representation and participation’ states: “Fundamental to the achievement of the goal of an inclusive society and the development of strategies that reflect the rights and needs of persons with disabilities is the question of process. Persons with disabilities must be full participants in the bodies and procedures by which both general laws and policies, as well as disability-specific ones, are formulated. This is essential for ensuring the responsiveness, legitimacy and effectiveness of such laws and policies, as well as reflecting the rights of persons with disabilities to full participation in the life of the community, including all forms of public decision-making.”<sup>176</sup> With respect to projects funded by multilateral assistance and by international funding institutions such as the World Bank, the Expert Group recommends the following<sup>177</sup>:

- (a) encourage states to adopt special policies and legislation that promote the full inclusion of persons with disabilities in all aspects of social, cultural and economic life;
- (b) develop and promote minimum standards relating to accessibility and related disability rights issues in connection with the projects they sponsor and fund;
- (c) encourage and help facilitate the development of working relationships between disability community advocate groups in different countries, utilizing the networks and partnerships they have worldwide, thereby encouraging the development of trans-national strategies to respond to the problems identified;
- (d) disability advocacy groups in countries/regions affected by the operation of trans-national groups should explore such strategies as the filing of litigation against trans-national corporations operating in their countries to enforce the extraterritoriality provisions of disability law in those corporations’ home countries.

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<sup>175</sup> Avoke, Mawutor (2002). Models of Disability in the Labeling and Attitudinal Discourse in Ghana. *Disability & Society*. 17(7). Pp. 769-777. (Quote, p. 775).

<sup>176</sup> UN:DESA (1998). *Strategies for Implementation at the National Level*. Page 9. [www.un.org/esa/socdev/enable/disberk4](http://www.un.org/esa/socdev/enable/disberk4)

<sup>177</sup> UN-DESA (1998). Page 12.

***Recommendations published by Disability Awareness in Action :<sup>178</sup>***

1. Listen to children and empower them.
2. Support parents to promote disabled children's rights.
3. Promote Inclusive education and Social Inclusion.
4. Challenge prejudice and promote positive attitudes toward disability.
5. Respect cultural rights.
6. Implement structures and policies to respect the rights of disabled children.

***Recommendations of the UN Committee on Rights of the Child (1997<sup>179</sup>):***

- (a) Adequate monitoring and data collection of empirical evidence to challenge the argument of cost-effectiveness used to marginalize disabled children (including cost evaluations of exclusion and lost opportunities);
- (b) Promote the UN Standard Rules as relevant to implementing UNCRC;
- (c) Ensure Inclusive Education is included on the agendas of UNESCO, UNICEF and other relevant agencies meetings, conferences, etc., as an integral part education debates;
- (d) Produce training materials to promote Inclusive Education (particularly UNICEF).<sup>180</sup>

One significant policy that many proposals have in common is the need to include persons with disabilities and special education needs as full participants in the bodies and procedures by which both laws and policies, and provision of services are formulated, implemented and evaluated. This policy is seen not only as a political and moral imperative, but a cost-effective one as well. Eleweke (2001)<sup>181</sup> researched the roles of DPOs in countries of the North and South regarding their impact on promoting SEN services. His comprehensive review cites evidence from countries such as Malaysia, New Zealand, that activities of strong and active pressure groups or associations of Persons with Disabilities have led to improvements in SEN provisions. These activities show promise for persuading governments to “recognize the needs of persons with disabilities and to take positive steps toward meeting these by improving [SEN] services” (page 110). However, according to Eleweke, many DPOs of the South still remain marginalized from government decision-making and are largely nominal in effect. For example, Nwazuoke (1995)<sup>182</sup> observes that “virtually all the patient and professional associations in the field of special needs in Nigeria are bereft of strong advocacy activities” (page 100).

Clearly, much progress has been made, yet much is still left to be accomplished to achieve an inclusive society and universal rights to Inclusive Education within society.

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<sup>178</sup> Source: Lansdown, G. *It Is Our World Too!* London: Disability Awareness in Action.

<sup>179</sup> As reported in Lansdown, G. *It Is Our World Too!* London: Disability Awareness in Action. Appendix 1, pp. 65-66. This list is summarized and excerpted and is not complete.

<sup>180</sup> As part of this review, the author examined UNICEF's recently published “*Priorities for Children 2002-2005*.” Disability and special education needs are cited only twice: p. 21 states that efforts should be taken to prevent disability as part of early childhood education initiatives, and p. 11 where disability is cited in a list of those who should be protected from discrimination.

<sup>181</sup> Eleweke, J. (2001). Physician Heal Thyself: The role of Disability Organizations in countries of the south towards improvements in Special Needs Provision. *African Journal of Special Needs Education*. 6(2), September 2001. Pp. 107-113.

<sup>182</sup> Nwazuoke, I. A. (1995). Professionalising special education in Nigeria: a review of legal issues' in E.D. Ozoji and I. A. Nwazuoke (Eds.), *Professionalism in Special Education in Nigeria*. Pp. 147-151. Jos, Nigeria: National Council for Exceptional Children.

## VI: Policy/Practice Implications: Critical Issues In Inclusive Education

This literature review has examined Inclusive Education practice, current trends, gaps, and implications for future research relating to specific inputs, processes, outcomes and contexts at macro-, meso-, and micro-levels. Chapter I introduced the concept of Inclusive Education and its complexities in terms of goals and target populations. Chapters II and III focused on innovative Inclusive Education practices and trends at the grass-roots micro-level of schools and communities in the North and South. Chapter IV provided an overview of meso-level systems in support of practice, highlighting economic issues of funding, resource allocation, and efficiency/effectiveness strategies related to Inclusive Education practice. Chapter V provided a summary of macro-level national and international policy and legislation that affect micro-level school practices and meso-level organizational systems.

The literature makes clear that these three levels, and their dimensions of inputs, process, outcomes, and external factors are interrelated and context dependent. Taken as a whole, this review provides fertile ground for policy/practice implications to address next steps. Numerous comprehensive policy recommendations and frameworks for action have been developed—both general and specific to SEN learners—in relation to Millennium Development Goals. This chapter cannot begin to articulate Inclusive Education policy recommendations in the detail that these documents offer. In fact, it would be presumptuous for a single author to undertake this task.<sup>183</sup>

This particular review does, however, illuminate several critical policy/practice issues and their implications concerning Inclusive Education. Typically, policy relevant to Inclusive Education begins with a declaration (e.g., the Salamanca Statement) or convention (e.g., Convention on the Rights of the Child) and follows with a Framework for Action or Implementation Handbook (CRC). In between declarations and frameworks lies a broad terrain of policy/practice critical to implementing Inclusive Education. In *Disabling Policies? A comparative approach to education policy and disability*, Gillian Fulcher (1989) provides a framework for policy analysis that is adopted in this chapter in order to identify this terrain and to relate it to policy implications for Inclusive Education.<sup>184</sup> This framework characterizes policy as follows:

**1) Policy may be written, stated, or enacted.**

From this perspective, just because more than 80% of countries in the North and 50% in the South (Asia and Pacific region) have *written* policies on Inclusive Education, it does not automatically follow that these policies will be enacted in a particular form or guidelines, *talked about*, *believed in*, or even *enacted* at all. Written policy gets translated into practice in different forms at different levels, so the notion that policy at the national level determines other levels of policy and practice is reductionist. National policy may have widespread effects, but does not *a priori* determine what education officials and teachers produce as policy.

**2) Policy involves a struggle among stakeholders with competing objectives.**

Policy involves a struggle among stakeholders with competing objectives. In Inclusive Education, different democratic, economic, technical, social, or cultural objectives may dominate or be pursued simultaneously. For example, teaching and learning in classrooms are never merely technical acts. Where, how and what to teach are morally and politically informed (such as decisions about placement, a learner's functioning, and perceptions of their capabilities). Each objective also deploys a particular discourse as both tactic and theory in a web of power relations. For example, those with economic objectives use the language of cost-effectiveness, and accountability and apply this language as both tactic (assessments) and

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<sup>183</sup> The reader may refer to Annex 3 for examples of documents and citations for other sources that contain comprehensive policy recommendations, including *The BIWAKO Millennium Framework for Action* (Asia and Pacific region.), *2002 Action Plan for Disabled Peoples International*, *2002 Resolution of the International Disability Alliance*.

<sup>184</sup> G. Fulcher (1989). *Disabling Policies? A comparative approach to education policy and disability*. East Sussex: Falmer Press.

theory (school improvement).

**3. Policy does not exist without practice.**

All practices and policies are theory-based. Theories and policies are about practice and are themselves practical activities. Inclusive Education is simultaneously a philosophy and a practice based on particular theories of teaching and learning.

**4. Social actors (individuals and groups) make policy a social practice.**

Policy is the exercise of power at different levels (macro, meso, micro). All policies and practices are shaped by people (actors) in the context of society (local, national, and global).

This conception of policy—as a struggle that takes different forms and is exercised at different levels by social actors with different objectives and under different conditions and power relations—provides a useful lens for analyzing Inclusive Education policy implications in relation to particular critical issues. As an example, this literature review identified identification and placement as critical issues involving policy decisions. Donor agencies often insist on child-find surveys to determine demand. Children identified in these surveys are often labeled as disabled or SEN learners. These labels represent a language and theory of education as compartmentalized—special and regular—which results in practices that operate to segregate and categorize learners based on individual characteristics. Further, decisions to include learners (i.e., placement decisions) clearly involve policy struggles at all levels -- classroom, educational bureaucracy, and government—and among several stakeholders—teachers, parents, and education officials. Further, decisions that some learners have special education needs leads to a solution focused on extra resources, whereas Inclusive Education suggests a solution focused on school restructuring and pedagogy. These theoretical and policy-based dimensions of child-find surveys also involve practical economic consequences. In a world of constrained resources, investment in identification often means less investment in and reduced resources for direct educational services.

This example of identification and placement from the policy/practice framework developed above, illustrates the need to examine policy implications from multiple perspectives. From the literature on IE practices in the North and South, and the dimensions of IE that were described at various levels, nine critical issues have been identified. Each of these issues is (1) described; (2) particular features of each issue are listed as either potential facilitators or barriers to IE (represented by + and – symbols); (3) specific implications for policy/practice are discussed. Each of these nine issues carries significant weight and is interdependent with the others. It is not the purpose of this review to suggest their relative importance. These choices will be determined by individual and group stakeholders at various levels and by the experience of different conditions. The incentive/disincentive descriptions and specific policy implications for each issue, do however rest on the premise that Inclusive Education, as defined in the *Salamanca Statement and Framework for Action* (See Chapter I), should be the guiding principle for the development of *Education for All* and for implementation of the *Millennium Development Goals*.

### **1. Decentralization**

The literature describes a definite global trend toward devolvement of Inclusive Education policy/practice decisions to local and community levels.

- + responsive and sensitive to local contexts and conditions such as population density (urban/rural)
- + has been proven to support and encourage innovative practices to meet the specific needs of communities, schools, and learners
- several countries report an unintended consequence of wider variations in quality and type of services resulting in inequalities
- local levels may establish priorities and make decisions that act to exclude rather than include SEN learners

**Policy Implication:** Decentralization that supports Inclusive Education must be accompanied by central government policies that provide incentives for innovative and promising practice and build on local strengths, while at the same time safeguard and ensure that *universal* rights of access and participation in IE are applied equally to SEN learners.

## 2. Finance/Resource Allocation

The literature review makes clear that critical levels of investment are needed, but that the ways in which monies are allocated produce powerful influences on Inclusive Education implementation.

- + when focused on social benefits as well as economic benefits
- + when allocations encourage a unified system of education service delivery
- + when the discourse encompasses universal right to education versus needs that are subject to cost availability
- + when allocations guarantee a minimum level of support (flat grants) but provide adjustments (weighted formulas) for poverty/wealth indices at the national/state level and resource-based formulas allocate funding for needed services at the local level to meet the needs of individual classrooms and learners
- when allocations to schools are tied to performance standards that are affected by factors over which schools have little or no control such as societal conditions of poverty, and transience of learners (e.g., nomadic populations).
- when allocations encourage a dual system of education and segregation of SEN learners
- when economic benefits rest on narrow conceptions of productivity (employment) and do not consider improved health, well-being, and social benefits of education.
- when learners must be labeled and categorized in order to receive appropriate services

**Policy Implications:** Policies that do not require labeling of students in order to identify need for services should be considered preferable. Traditional labels (e.g. learning disability, emotional disturbance, mentally retarded) do not identify educational need. For example, a student may be diagnosed as having a reading difficulty and education interventions designed without being labeled “learning disabled.” The UK, for example, does not label students per se, but provides Needs Statements that identify the need for services and appropriate educational supports for students. Resource-based formulas that allocate funding based on established program needs do not require these traditional labels, and are beginning to be adapted more widely and should be considered. To be effective, resource-based formulas should be tied to specific policies at local levels -- such as funding only qualified units of instruction that specify levels of support (e.g., class size, support teachers) and other parameters linked to quality IE education. Policies that reduce discretionary power of educators to exclude SEN learners and that provide funding and other incentives for Inclusive Education initiatives have proven the most effective. Countries with developing economies and who have low primary enrolment rates, may conduct low-cost child-find surveys to identify those out of school, the reasons why (e.g., disability *and/or* impairment)-- and then construct policies based on these findings without using traditional labels. The need to collect data and to undertake child-find activities should be balanced by sensitivity to these labeling issues.

### 3. Access and Participation

Access refers to physical access (buildings), academic/program access (to curriculum and instruction through adaptations and supports), social access (to peers), economic access (to affordable schooling). Physical integration in schools does not equal nor ensure participation. For participation to be meaningful (lead to positive learning outcomes), factors such as a school climate that values diversity, a safe and supportive environment, and positive attitudes, are essential components of participation that have been identified in the literature.

- + when universal design promotes physical, social, academic (program), technological (communications and information technology), and economic access as a comprehensive total package for all learners
- + when conditions internal to schools as well as external conditions affecting access and participation are addressed together
- + when access and participation considerations are integral to program development, planning, implementation, and evaluation
- when negative attitudes create barriers to access and participation
- when different standards of participation and access are applied to different learners and/or when standards relating to accessibility do not exist
- when access and participation are not considered until after programs have been designed and buildings have been constructed

**Policy Implications:** Broad definitions of access and participation should be considered in IE policies and practices. Physical access to school buildings is an essential pre-requisite. Policies should be in place to require universal design, preferably before structures have been built. Costs are minimal compared to retrofitting, when universal design is incorporated in new building plans. Countries that have trained building contractors and engineers in universal design have been most successful in terms of building accessible facilities, and in terms of ensuring compliance with building codes. Further, promoting physical access to buildings without addressing the various barriers that make school *practically* inaccessible will not be effective. Access and participation are highly interdependent and should be considered together. Students cannot actively participate in instruction if the curriculum is not accessible. For example, the language and format of instruction are part and parcel of access. Sign language for the Deaf, Braille reading or large print texts for blind students, alternative formats of assessment (e.g., oral examinations) for non-readers, and technology supports/virtual environment (e.g. computers and educational software) are all examples of integral components of curriculum and instruction, not add-ons subject to availability.

### 4. Pre-service Teacher Training and In-service Professional Development

This literature review provides overwhelming evidence that training and professional development are central to IE practice in countries of the North and South. The review has highlighted exemplary training programs and provided detailed descriptions of factors that promote effective training, as well as challenges and barriers.

- + when special and general education teacher training are integrated and/or complementary
- + when teachers learn innovative child-centered strategies to teach a diverse range of abilities, as well as strategies that promote active student learning and adaptations to meet individual student needs

- + when teachers learn curriculum development strategies that encompass broad common goals; facilitate flexible structure; provide alternative/multiple assessments based on individual progress; address cultural/religious/linguistic diversity of learners; and content, knowledge and skills are relevant to learners' lived experiences
- + when teacher training provides hands-on experiences and opportunities for critical reflection as well as continuous/on-going feedback and support in classrooms
- training that focuses on individual "generic" deficits and categories of *dis*-ability
- training that expects teachers to change their ways of teaching without addressing changes needed in conditions of their work that may act as barriers to these changes (e.g., class size, lack of classroom materials and supports).
- training that promotes alternative assessments while schools require performance on standardized tests as the primary indicator of success
- teacher training that does not also include training school administrators, who without this training, may impede teacher reform rather than facilitate or support it.

**Policy Implications:** Most teacher training programs reported in the literature have focused on in-service professional development and utilized outside experts to conduct this training (many from donor agencies). Countries of the North and South face widespread teacher shortages, so the focus on in-service training is understandable. However, in-country tertiary institutions that provide pre-service education appear to constitute a largely untapped resource. Policies that would encourage building bridges between pre-service and in-service training through school-university collaboratives, hold the possibility of contributing effective short and long-term solutions to enskilling teachers. Also, departments of special and general education at university levels (and school levels) that do not provide integrated or embedded training no longer make sense—either practically or pedagogically--given the increasing numbers of children with special needs and the trend toward IE. Specialists will always be needed to teach specific skills to the small minority of SEN students; e.g., the Deaf, blind and deaf-blind students, and learners with severe multiple impairments. These students will need adapted instruction in the ordinary (IE) classroom with support from these specialists. Adapted curriculum and instruction within the domain of 'general education' teachers have been proven effective for all learners, including the majority of SEN learners (e.g., those with mild and moderate impairments). The implications for future policy point to policy/practice that support embedded teacher training. This training should bridge school-university special and general education programs, and utilize the expertise of special education faculty to provide problem-solving and critical-reflective generic skills that all teachers need to effectively teach diverse learners in ordinary (IE) classrooms. Current lack of data and assessments, also point to a critical need to support research on Inclusive Education (both tertiary and school levels) to ensure consistent and effective outcomes.

## **5. Universal Human Rights and IE Policy/Legislation**

In addition to the UN Declaration of Human Rights (1949) which establishes the universal right to education, most conventions and declarations pertaining to IE begin with the premise that a policy framework and legislative support at the national level must be in place as a necessary prerequisite to access and equal participation in IE programs. The literature makes clear that IE policies and legislation have provided parents, disabled people, and schools committed to IE, with the necessary conditions to challenge exclusion. However, individual country experiences demonstrate that policy and adopted legislation do not ensure enactment.

- + national level policy frameworks and legislation support IE and inclusion of persons with disabilities in all aspects of social, cultural and economic life

- + key governmental and education leadership decision-makers at all levels support policy and legislation
- + policy and legislation is accompanied by effective and specific mechanisms for monitoring and evaluating compliance
- infrastructure lacks resources and/or commitment to enforce compliance
- little or no critical awareness of why these policies and legislation are needed
- lack of support and conscientization--particularly at the grass-roots levels where policy is enacted

**Policy Implications:** Countries that have not only passed legislation and adopted IE policies, but have conducted systematic monitoring, backed-up by enforcement are most positively positioned to enact IE policy. However, those countries that have been most successful have coupled these strategies with comprehensive education (knowledge dissemination) and awareness training directed at all levels of the system. Policy implications point to comprehensive policy/practice activities that enforce written policy/legislation, while at the same time address beliefs and practices through education directed at promoting positive attitudes and enhancing awareness of those positioned to enact policy at the grass-roots level-- schools and classrooms.

## 6. School Restructuring and Whole-School Reform

The literature stresses that IE is a guiding philosophy enacted through inclusive policy/practice that requires comprehensive school restructuring. This restructuring, it is argued, should be supported by changes in beliefs, methods and resource allocations at all levels of educational systems and governance.

- + when IE principles and practices are considered as driving reform as well as integral to reform, and not an add-on program
- + when diversity and individual differences as well as similarities are recognized and *valued*, not 'tolerated' or 'accepted'. Diversity becomes a common denominator, not an individual numerator.
- + when new roles and responsibilities are clearly identified, and all staff systematically prepared for these new roles and provided with adequate supports
- + when individualized education is considered a universal right and not a special education need
- + when school reform includes active involvement and participation of community members, parents, and students
- when the philosophy of one-size-fits-all is mistaken for IE
- when IE is conceptualized as a place, not a service. Most countries of the North and the South still adhere to a 'continuum of placements' paradigm. IE considers delivery of services within the general education classroom as the continuum. This distinction is a critical one.
- when school reform is dictated from the top down, rather than developed through participatory decision-making

**Policy Implications:** School Effectiveness Reform and IE are not synonymous. Some aspects of school effectiveness reform act as barriers to IE; e.g., evidence suggests that schools may reject students who do not measure up on standardized test scores, or who are 'difficult' to teach. The narrow emphasis on performance outcomes as measured by standardized test scores often disadvantages students when consideration for accommodations such as alternative formats and primary language differences are not given. Many SEN students can and do perform as well or better than

their peers, when given appropriate accommodations. As a result, policy implications point to school restructuring and reform that considers broader policy/practice—especially in terms of outcomes. However, standards need not be lowered for SEN students. IDEA 1997 in the United States mandates high expectations through requiring documented progress of SEN students in the general education curriculum. This requirement, however, emphasizes individual progress towards broad goals, and not comparative measures. The literature also provides a growing body of evidence that IE benefits all students, not just SEN students. School reform policy should therefore focus on a unified system that provides an environment in which all students have an equal opportunity to reach their maximum potential. The distinction between equal opportunity and equal treatment is central to IE policy. IE does not mean that everyone should be treated equally (one-size-fits-all), but that individualized supports (treatment according to need) aim toward equal success that is measured broadly.

## 7. Identification and Placement

For countries of the South, low enrolment of SEN students and lack of access to schools for these students (particularly in rural areas) makes identification and placement issues especially critical. In addition, efforts in the South tend to focus on Category A students (ISCED-97 definition) whose disabilities have clear biological causes. Gender differences (bias toward boys) also emerged in the literature as a critical issues related to identification in both the North and South. Finally, while a definite trend toward placement in IE settings has been documented in both the North and South, studies have reported that regular curriculum adaptation for SEN students is still the exception and not the rule in the South, and in the North, significant numbers of SEN students still remain in segregated settings.

- + low-cost child-find surveys with outreach/education components to encourage participation
- + identification and placement efforts based on need for services, not category of SEN
- + identification and placement decisions involve parents as partners and are based on individualized education plans
- + placement decisions consider IE as a continuum of services in the general education classroom
- + networks of support (cluster schools, resource centers) and teacher training reduce the need for identification and referral
- deficit-based categorical identification, and/or subjective/arbitrary labeling
- placement decisions based on available service versus the needs of the learner
- education officials and teachers make arbitrary decisions to deny services and exclude learners based on individual preferences or costs/availability of services

***Policy Implications:*** Policies must balance the need to identify students for services with the realization that labels carry stigma and place the focus on the child’s perceived deficit, rather than on the schools’ responsibility for providing an appropriate education in an inclusive environment. Most SEN students experience learning difficulties that are related to the environment, rather than an innate characteristic. Schools that focus efforts on enskilling teachers to instruct diverse SEN learners with different abilities reduce referral rates and the need for extensive and costly diagnoses. Whole-school IE programs, cluster schools, and resource centers also reduce the need to label students by providing supports to the general education classroom. Identification can also be costly, diverting resources from essential direct services. Examples of low-cost child-find surveys described in this literature review provide evidence that community-based/parental approaches to surveys can lower costs significantly. Studies also indicate that identification and placement efforts need to focus on the large numbers of SEN students who are either at-risk in school, repeaters, or drop-outs. Many of these students likely have mild or moderate impairments. Finally, the literature makes clear that parental involvement is necessary and cost-effective:

parents are often the best source of expertise on their students' needs and the strongest advocates. Policies that encourage parental involvement and that provide guarantees for their rights in decision-making processes, or at least the right to challenge decision must be considered essential parts of policy frameworks and legislation. This right is essential as a check and balance to education authorities, who have often made arbitrary decisions to exclude children based on individual preferences or cost considerations.

### 8. Assessment, Accountability, Efficiency and Effectiveness

This review provided evidence that assessment issues constitute one of the most significant challenges for IE/EFA. First, student assessments have been tied to school effectiveness in problematic ways. Second, critics of efficiency discourses have countered with equity discourses, and although many researchers argue that equity and excellence are (and should be) compatible goals, different proposals to achieve these goals have created tensions at all levels. Third, school effectiveness has proven difficult to measure, data are scarce, and there is widespread agreement that much more needs to be accomplished in this area. A growing body of research (especially in the North) does indicate that IE benefits both SEN students and their peers, and that given the appropriate supports and adapted curriculum, SEN students can do as well or even better than their peers.

- + when student assessments measure individual progress in the general education curriculum, with clear standards and benchmarks
- + when multiple forms of student assessments (formative and summative) are used to inform and facilitate teaching and learning
- + when school-level evaluation is built-in to program planning
- + when broad conceptions of student outcomes include mastery of academic skills as well as self-esteem and independent living skills needed for active participation in society as adults
- when standardized achievement test scores are used as the sole indicator of success for both students and schools
- when schools have no systematic plan for evaluation, including development, implementation, and follow-up
- when equity is valued over excellence, or excellence valued over equity

**Policy Implications:** Several projects discussed in this review cited the lack of expertise in conducting assessments as a significant reason why data has not been collected. IE programs have begun to include training components for teachers and education officials to learn to conduct school evaluations and student assessments. Despite recognition that curriculum-based assessments provide the best teaching and learning tools, heavy reliance on standardized test scores as outcome measures of success at the school level has discouraged teachers from using these assessments. Further, standardized tests measure content knowledge, but have been challenged in the research as poor indicators of success post-schooling. These conditions point to the need to develop policies that (1) allocate resources (economic and technical) to schools for training in evaluation and assessment procedures that measure academic as well as social outcomes and community benefits attributed to IE; (2) require systematic assessments at school-level and allocate resources for implementing these assessments. Further, assessments should not be used solely for the purpose of rating schools (as in UK League Tables, and US No Child Left Behind sanctions for 'failing' schools), but as tools for improvement. Several studies also indicated that improvement takes time, and that schools should not expect dramatic results immediately. This finding points to the need to develop both short and long-term evaluation plans. Policies related to assessment need to encompass issues of equity and excellence in ways that do not undermine, compromise, or

water-down either goal for *all* learners, SEN included. Finally, the nearly universal lack of data points to a critical need to support systems for collecting and analyzing data at all system levels.

## **9. Building Capacity and Sustainability through NGO, Community, and Multi-Sector participation**

This literature review has provided several examples of IE projects that enhanced the capacity of schools and communities to provide SEN services through multi-sector collaboration. Driven by severe resource constraints, countries of the South have been especially successful in using this strategy to reduce costs, increase benefits, and reach greater numbers of SEN children and youth. Multi-sector participation is especially critical in relation to disability: access to quality health care, social services, early childhood intervention programs provide essential supports for IE in schools. Whole-community approaches recognize children's holistic needs, especially the fact that the child is an integral family member. Supports for and involvement of family members substantially increase opportunities for children to attend school. Community involvement also increases the likelihood of sustainability through responsibility, commitment, ownership, and pride in accomplishments. Specifically, the research provides clear evidence that commitment to IE is an essential pre-requisite to success and sustainability. NGOs and INGO donors play important roles in building capacity and sustainability. There is increasing evidence of a paradigm shift on the part of donor agencies with regard to IE projects. Instead of the traditional top-down-expert-trainer model, several INGO funders of projects in this literature review were making a noticeable shift to a trainer-of-trainers approach, adapting training materials to local conditions, and beginning to include disabled people in workshops. All of the experiences of Inclusive Education indicate that 'schools without borders' are becoming the wave of the future. Country experiences indicated several critical conditions, both facilitators and barriers to building capacity and sustainability through multi-sector participation.

- + when based on a holistic and rights-based conception of children, beginning with early identification, treatment and child development as important influences on health and well-being, school-readiness
- + when specific coordination plans, including time-lines, designated lead agencies, clear roles and responsibilities
- + when active and targeted outreach activities and IE awareness education reach a broad audience in the community, particularly parents
- + when DPOs and Parent Groups are included as decision-makers and resources at all stages of development
- + when formal parent-training is provided and encompasses families of children with disabilities, and those at-risk
- loose or unorganized links between government entities, community-based resources and schools (leads to competition for scarce resources, reducing access to services)
- knowledge dissemination/awareness training is weak, poorly planned, and delayed until after the start of the IE project
- Donor agencies provide outside expertise to head programs rather than facilitate, build capacity of local expertise
- When Parent Groups and DPOs are marginalized

***Policy Implications:*** Establishing and developing multi-sector participation provides several challenges. But the costs of lack of coordination in terms of lost resources and lost benefits/services provide compelling reasons to aggressively pursue community/agency participation in IE project development. Experience dictates that policies should include strategies for coordination and that these should be developed before initiating IE projects. The successes of programs that

conducted comprehensive outreach and awareness training (particularly in advance of projects) indicate policies should include plans for substantial investments in this training. Government, NGO and international agency policies should formally require DPO/parent involvement and training in IE projects—not just marginally as ‘resources’, but integrally as decision-makers and active participants. In countries and regions where DPOs are weak, a UN committee on disability affairs recommends making investments in these DPOs to increase capacity. DPOs and Parent Groups can play a major role in advocating for Inclusive Education, and in encouraging parents to send their children to school and to get involved. Finally, some countries still locate responsibility for services to disabled people in ministries of social welfare. Every effort should be made to rectify this arrangement. EFA, CRC, and several Frameworks for Action assert education as a right, and not a charity-model welfare need. Ministries of Social Welfare may contribute to coordinating services, but they are not well-prepared or even appropriate for administering educational programs in schools.

### **Conclusion: *Education for All—Together***

The fundamental principle of EFA is that all children should have the opportunity to learn. The fundamental principle of Inclusive Education is that all children should have the opportunity to learn— together. Diversity is a characteristic that all children and youth have in common—both within each individual child and across individual children. There is strength in diversity, and all children have strengths. It is the fundamental responsibility of all those who teach and of all those who support teachers to build on children’s strength, to believe in all children’s capacity to learn, and to uphold their right to learn. Children are our future. As Ms. Gabriela Arrieta and Ms. Audrey Cheynut put it in their opening address at the UN Special Session on Children (May 2002): “We are not the sources of problems. We are the resources that are needed to solve them. We are not expenses, we are investments.”

We must invest our beliefs, our resources, and our intellectual problem-solving abilities in Inclusive Education. We know what works. Every country in the world today has at least one teacher, one school, one inclusive education program committed to Inclusive Education. Some countries have a great deal more. These ‘islands of excellence’ must help the rest of us cross the artificial continental divide between ‘special’ and ‘regular’ education. Arguments of excess costs no longer justify exclusion. Compared to segregated programs, Inclusive Education is cost-effective. Moreover, the costs of exclusion are high in terms of lost productivity, lost human potential, lost health and well-being.

Some children start school with more advantages than others—advantages of wealth and health among the most influential. Children in poverty and children with impairments, and all marginalized children (whether due to language, religion, race, ethnicity, gender) do not have to be disadvantaged by their treatment in schools or by exclusion from schools. “If you deny disabled people educational opportunities, then it is the lack of education and not their disabilities that limit their opportunities.”<sup>185</sup> Inequalities of opportunity exist, even in the wealthiest countries. Jonathan Kozol’s book, *Savage Inequalities* (1991)<sup>186</sup>, provides stark pictures of these inequalities in US schools. These inequalities are a reflection of our beliefs. That is, the ways in which we allocate resources reflect our beliefs about the value of education for all children, and for particular children. Our priorities say more about our values and our philosophical commitment to education than they do about our capacities to provide education. Conditions of marginalized children at the edge of a society reveal more about the state and progress of a society than conditions at the middle. These children, as a radically marginalized sector of society, reflect the unadorned aims of education and society in general.

Today’s inequalities and state of progress toward EFA provide both challenges and opportunities. If we are to meet our collective Millennium Development Goals—ratified by 152 countries worldwide—we are challenged to commit ourselves to the Frameworks for Action. Our opportunities will manifest themselves in the day-to-day tasks that we undertake with individual children, in classrooms, in schools and in society. Universal Primary Education and *Education for All—Together* are worthy goals. It is hoped that this review has made a contribution to them.

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<sup>185</sup> Quote is taken from a 2003 press release of the World Bank and is attributed to Judy Heumann, the Senior Advisor to the Disability Group, The World Bank.

<sup>186</sup> J. Kozol (1991). *Savage Inequalities: Children in America’s Schools*. New York: Crown Publishers, Inc.

**Annex 1: Classifications of Disability and Notes on definitions**

Terms used to describe children with special education needs in selected countries

[>These countries use one term to describe blind/partially sighted and deaf/partially hearing children]

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Australia			*		*	>	*	>	*	*						*
Austria			*	*	*	*	*	*	*	*		*			*	
Belgium	**	*	*	>	*	>	*	*	*	*						
Canada						*	>	*	>							*
Denmark			*	*	*	*	>	*	>	*	*	*				
Finland	**	*	*	>	*	>	*	*	*	*			*	*		
France			*	*	*	*	*	*	*	*	*					*
Germany			*	*	*	*	*	*	*	*	*	*				
Greece	**	*	*	>	*	>	*	*	*							
Iceland			*	*	*	*	*	*	*	*	*	*				*
Ireland			*	*	*	*	>	*	>	*	*		*		*	
Italy																*
Japan			*	*	*	*	*	*	*	*	*	*			*	
Netherlands			*	*	*	*	*	*	*	*	*	*			*	
Norway	**	*	*	>	*	*	*	*	*					*		
Spain			*	*	*	*	>	*	>	*						
Sweden	*		*	>	*	>		*								
Switzerland			*	*	*	*	*	*	*	*	*	*		*	*	
Turkey			*	*	*	*	>	*	>	*	*	*				*
United Kingdom																*
United States			*	*	*	*	>	*	>	*	*	*			*	

1. Mild learning difficulties, learning disabilities, specific learning disabilities, subject-related disabilities
  2. Moderate learning difficulties, educable mentally retarded, educable mental handicap, general learning disabilities, moderate mental retardation
  3. Severe learning difficulties, severe mental retardation, severe mental handicap, trainable mental handicap, profound mental handicap
  4. Speech difficulties, language and communication disabilities, specific language impairment, speech and communication difficulty, speech handicap
  5. Hearing impairment, hard of hearing
  6. Deaf
  7. Visual impairment, visual handicap, partially sighted
  8. Blind
  9. Emotional/behavioural difficulties, psycho-social disabilities, psychiatric difficulties, personality difficulties, deviant behavior, serious emotional disturbance
  10. Physically handicapped, motor impairment, sensori-motor disabilities, orthopedically handicapped, orthopaedic impairment
  11. Autistic, Asberger Syndrome
  12. Chronic conditions requiring prolonged hospitalization, paediological institutes, other health impairments
  13. Children of the traveling community
  14. Pupils whose first language is foreign
  15. Multiply handicapped, severe sensory/mentally retarded, multiple disabilities
  16. Exceptional children, children with special educational needs, handicapped children, gifted, deaf-blindness and others
- (OECD, 1995)

## **Annex 2: Sources for Information on Disability, Inclusive Education and Human Rights**

### **A. Organizations working for the Rights of Disabled Children and Youth**

Disability Awareness in Action [www.daa.org](http://www.daa.org)  
Inclusion International [www.inclusion-international.org](http://www.inclusion-international.org)  
Disabled Peoples' International [www.dpi.org](http://www.dpi.org)  
International Disability and Development Consortium [www.iddc.org.uk](http://www.iddc.org.uk)  
Child Rights Information Network  
Save the Children Alliance Task Group on Disability & Discrimination  
UN High Commissioner for Human Rights [www.unhchr.ch](http://www.unhchr.ch)  
European Disability Forum [www.edf-feph.org](http://www.edf-feph.org)

### **B. Sources for International Documents**

Centre for Studies on Inclusive Education [www.inclusion.uwe.ac.uk/csie](http://www.inclusion.uwe.ac.uk/csie)  
United Nations: DESA [www.un.org/esa/socdev](http://www.un.org/esa/socdev)  
Save The Children [www.savethechildren.org.uk](http://www.savethechildren.org.uk)  
The Danish Council of organizations of Disabled People [www.disability.dk](http://www.disability.dk)  
Swedish DPI Association [www.shia.se](http://www.shia.se)  
UNESCO [www.unesco.org/education/efa/know\\_sharing/flagship\\_initiatives/disability.shtml](http://www.unesco.org/education/efa/know_sharing/flagship_initiatives/disability.shtml)

### **C. Sources for Training Materials related to Rights and Inclusive Education**

EENET—Enabling Education Network [www.eenet.org.uk](http://www.eenet.org.uk)  
Disability Awareness in Action [www.daa.org](http://www.daa.org)  
Inclusion Press International [www.inclusion.com](http://www.inclusion.com)  
Training Resource Network Disability Update [www.trninc.com](http://www.trninc.com)  
Save The Children [www.savethechildren.org.uk](http://www.savethechildren.org.uk)  
Institute on Independent Living [www.independentliving.org](http://www.independentliving.org)  
UNESCO Teacher Education Resource Pack: Special Needs in the Classroom  
[www.unesco.org/education/educprog/sne](http://www.unesco.org/education/educprog/sne)

### **D. Sources for News and Updates related to Inclusive Education**

UNICEF, Education Update  
EENET -Enabling Education Network  
Inclusion Press International [www.inclusion.com](http://www.inclusion.com)  
Disability World (bi-monthly web-zine) [www.disabilityworld.org](http://www.disabilityworld.org)  
World Institute on Disability [www.wid.org](http://www.wid.org)  
Centre for Studies on Inclusive Education [www.inclusion.uwe.ac.uk/csie](http://www.inclusion.uwe.ac.uk/csie)  
DISABILITY.DK

## **ANNEX 3: DECLARATIONS**

**BIWAKO MILLENNIUM FRAMEWORK FOR ACTION TOWARDS AN INCLUSIVE,  
BARRIER-FREE AND RIGHTS-BASED SOCIETY FOR  
PERSONS WITH DISABILITIES IN ASIA AND THE PACIFIC**

**C. Early detection, early intervention and education**

*1. Critical issues*

24. Available evidence suggests that less than 10 per cent of children and youth with disabilities have access to any form of education. This compares with an enrolment rate of over 70 per cent for non-disabled children and youth in primary education in the Asian and Pacific region. This situation exists despite international mandates declaring that education is a basic right for all children and calling for the inclusion of all children in primary education by 2015. Governments should ensure the provision of appropriate education which responds to the needs of children with all types of disabilities in the next decade. It is recognized that there is wide variation in the response which Governments in the Asian and Pacific region have made in providing education for children with disabilities, and that children are currently educated in a variety of formal and informal educational settings, and in separate and inclusive schools.

25. The exclusion of children and youth with disabilities from education results in their exclusion from opportunities for further development, particularly diminishing their access to vocational training, employment, income generation and business development. Failure to access education and training prevents the achievement of economic and social independence and increases vulnerability to poverty in what can become a self-perpetuating, inter-generational cycle.

26. Infants and young children with disabilities require access to early intervention services, including early detection and identification (birth to four years old), with support and training to parents and families to facilitate the maximum development of the full potential of their disabled children. Failure to provide early detection, identification and intervention to infants and young children with disabilities and support to their parents and caretakers results in secondary disabling conditions which further limit their capacity to benefit from educational opportunities. Provision of early intervention should be a combined effort of Education, Health and/or Social Services.

27. Currently education for children and youth with disabilities is predominantly provided in special schools in urban centres and is available to limited numbers of children in many countries of the Asian and Pacific region. The Salamanca Statement and Framework for Action on Special Needs Education recommended that inclusive education, with access to education in the regular local neighbourhood or community school, provides the best opportunity for the majority of children and youth with disabilities to receive an education, including those in rural areas. Exceptions to this rule should be considered on a case-by-case basis where only education in a special school or establishment can be shown to meet the needs of the individual child. It is acknowledged that in some instances special education may be considered to be

the most appropriate form of education for some children with disabilities.<sup>187</sup> The education of all children, including children with disabilities, in local or community schools assists in breaking down barriers and negative attitudes and facilitates social integration and cohesion within communities. The involvement of parents and the local community in community schools further strengthens this process.

28. Major barriers to the provision of quality education for children with disabilities in all educational contexts include the lack of early identification and intervention services, negative attitudes, exclusionary policies and practices, inadequate teacher training, particularly training of all regular teachers to teach children with diverse abilities, inflexible curriculum and assessment procedures, inadequate specialist support staff to assist teachers of special and regular classes, lack of appropriate teaching equipment and devices, and failure to make modifications to the school environment to make it fully accessible. These barriers can be overcome through policy, planning, implementation of strategies and allocation of resources to include children and youth with disabilities in all national health and education development initiatives available to non-disabled children and youth.

29. Governments, in collaboration with other stakeholders, need to provide sport, leisure and recreational activities and facilities for persons with disabilities, as the fulfillment of their basic rights to the improvement of life.

## **2. Millennium development goal**

30. In this priority area the millennium development goal is to ensure that by the year 2015, children everywhere, boys and girls alike, will be able to complete a full course of primary schooling and that girls and boys will have equal access to all levels of education.

## **3. Targets**

*Target 6.* Children and youth with disabilities will be an integral part of the population targeted by the millennium development goal of ensuring that by 2015 all boys and girls will complete a full course of primary schooling.

*Target 7.* At least 75 per cent of children and youth with disabilities of school age will, by 2010, be able to complete a full course of primary schooling.

*Target 8.* By 2012, all infants and young children (birth to four years old) will have access to and receive community-based early intervention services, which ensure survival, with support and training for their families.

*Target 9.* Governments should ensure detection of disabilities at as early an age as possible.

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<sup>187</sup> See General Assembly resolution 48/96 of 20 December 1993 on Standard Rules on the Equalization of Opportunities for Persons with Disabilities, annex, rule 6. Education, para. 8.

#### *4. Action required to achieve targets*

1. Governments should enact legislation, with enforcement mechanisms, to mandate education for all children, including children with disabilities, to meet the goals of the Dakar Framework for Action and the millennium development goal of primary education for all children by 2015. Children with disabilities need to be explicitly included in all national plans for education, including national plans on education for all of the Dakar Framework for Action.
2. Ministries of Education should formulate educational policy and planning in consultation with families and organizations of persons with disabilities and develop programmes of education which enable children with disabilities to attend their local primary schools. Policy implementation needs to prepare the school system for inclusive education, where appropriate, with the clear understanding that all children have the right to attend school and that it is the responsibility of the school to accommodate differences in learners.
3. A range of educational options should be available to allow the selection of a school that will best cater for individual learning needs.
4. Adequate public budgetary allocation specifically for the education of children with disabilities should be provided within the education budget.
5. Governments, in collaboration with others, should collect comprehensive data on children with disabilities, from birth to 16 years old, which should be used for planning appropriate early intervention and educational provision, resources and support services, from birth through school age.
6. Five year targets should be set for the enrolment of children with disabilities in early intervention, pre-school, primary, secondary and tertiary (post-school) education. Progress towards meeting these targets should be closely monitored with a view to achieving the goal of 75 per cent of children with disabilities in school by 2012.
7. Ministries of Health and other concerned ministries should establish adequate early detection and identification services in hospitals, primary health care, centre and community-based health care services, with referral systems to early intervention services for all disabled infants and children (birth to four years old). Governments should routinely screen high-risk pregnancies and high-risk newborn babies for early detection of disabilities at birth or soon thereafter.
8. Ministries of Health and Education should establish early intervention services, in collaboration with other concerned ministries, self-help organizations, NGO and community-based agencies, to provide early intervention, support and training to all disabled infants and children with disabilities (birth to four years old) and their families.
9. Governments, including Ministries of Education, should work in partnership with NGOs at the national and local level to conduct public awareness campaigns to inform families of children with disabilities, schools and local communities, of the right of children and youth with disabilities to participate

in education at all levels, in urban and rural areas, and with particular emphasis on the inclusion of girls with disabilities where there is a gender imbalance in school attendance.

10. The following measures should be taken, where appropriate, by Governments in the region to improve the quality of education in all schools, for all children, including children with disabilities, in special and inclusive educational contexts: (a) conduct education and training for raising the awareness of public officials, including educational and school administrators and teachers, to promote positive attitudes to the education of children with disabilities, increase sensitivity to the rights of children with disabilities to be educated in local schools and on practical strategies for including children and youth with disabilities in regular schools; (b) provide comprehensive pre- and in-service teacher training for all teachers, with methodology and techniques for teaching children with diverse abilities, the development of flexible curriculum, teaching and assessment strategies; (c) encourage suitable candidates with disabilities to enter the teaching profession; (d) establish procedures for child screening, identification and placement, child-centred and individualized teaching strategies and full systems of learning and teaching support, including resource centres and specialist teachers, in rural and urban areas; (e) ensure the availability of appropriate and accessible teaching materials, equipment and devices, unencumbered by copyright restriction; (f) ensure flexible and adaptable curriculum, appropriate to the abilities of individual children and relevant in the local context; (g) ensure assessment and monitoring procedures are appropriate for the diverse needs of learners.

11. Governments should implement a progressive programme towards achieving barrier-free and accessible schools and accessible school transport by 2012.

12. Governments should encourage programmes of research at tertiary institutions to develop further effective methodologies for teaching children and youth with diverse abilities.

13. Organizations of and for disabled persons should place advocacy for the education of children with disabilities as a high priority item on their agenda.

14. Regional cooperation needs to be strengthened to facilitate the sharing of experiences and good practices and to support the development of inclusive education initiatives.

# **Disabled Peoples' International (DPI)**

## **Sapporo Platform**

### **October 2002**

A DPI call to disabled people throughout the world:

#### **Peace**

As disabled people we are opposed to wars, violence and all forms of oppression. Daily, men, women and children are being disabled by land and personnel mines, and forms of armed destruction and torture. We must work for a world where all people can live in peace and express their diversity and their desires.

#### **A Strong Voice of Our Own**

Disabled Peoples' International must continue to grow in strength and voice. We are the experts regarding our situation, and we must be consulted at all levels, on all initiatives concerning us. If we are to achieve a strong voice, we must be united in our work; we must build a strong organization. We must share our knowledge, our experiences, and our resources, and encourage youth leadership. We must use technology as a vehicle to communicate, to discuss, and to promote issues and concerns.

#### **Human Rights**

As a human rights organization, we must seek support for a convention that will protect and respect our human rights. We must be educated, and, in turn, educate civil society, and government at all levels. We must learn from the strategies and successes of others, such as landmines survivors and women. Our rights are violated on a daily basis; we must continue to gather the evidence.

#### **Diversity Within**

In our work, our organization at all levels must ensure the inclusion of women, youth, and other minorities. We must ensure participation through equality of language. We must strive to uphold our commitment to our official languages: French, Spanish, English, and sign language. We are a cross disability organization, so we must ensure that all materials are available in alternative formats.

#### **Bioethics**

We must become part of the discussions on genetics and bioethics. We must assert our right to be different. We must repudiate any discussion that links the concept of "person" to a set of abilities. We must promote disability studies to change the image of disability in a positive way among academics.

#### **Independent Living**

Self-determination and independent living is fundamental to our human rights. We must undertake a program of education of people with disabilities and civil society on the concept of independent living. We must consider our cultural differences in adapting independent living in some countries.

#### **Inclusive Education**

Full participation starts in childhood: in the classroom, in play areas, and in programs and services. When children with disabilities sit side by side with other children, our communities are enriched by the awareness and acceptance of all children. We must urge governments throughout the world to eradicate segregated education, and to establish an inclusive education policy.

## International Development

International Development organizations must evaluate their policies, programs and services to ensure the inclusion of disabled people. We must encourage the governments that financially support these agencies to include specific policies that ensure the full participation of disabled people, by the provision of accessible and appropriate service delivery.

## Public Awareness

Our issues are many: income generation, education, impact of poverty etc. We must educate civil society, as well as our political representatives regarding our concerns. We must use every opportunity to seek publicity and awareness. We must seek to change negative images of disabled people so that future generations will accept disabled people as equal participants in our society.

## Share the Knowledge

As participants of this assembly, we are among the fortunate few who have come here to listen to each other, to discuss our views and opinions, and to reaffirm our commitment to our work. We must, therefore, make it our duty and responsibility to communicate to our grass roots comrades what has taken place here. While we feel empowered by this great assembly of 3000 people, we must now empower those who could not attend.

**This is our challenge; this is our task.**

NB. This platform must be considered in conjunction with the Sapporo Declaration and resolutions of the Sapporo workshops. Together these documents form the 2002-2006 Action Plan for Disabled Peoples International.

## IDA

### International Disability Alliance

Disabled Peoples' International, Inclusion International, Rehabilitation International, World Blind Union, World Federation of the Deaf, World Federation of the Deaf-Blind, World Network of Users and Survivors of Psychiatry

The International Disability Alliance (IDA) offers the following resolution outlining critical points pertaining to the development of a treaty on the rights of persons with disabilities. This document does not claim to be an exhaustive examination of all issues that should be addressed in a treaty. However, it represent a consensus of IDA members regarding many important elements related to both the development process and ultimate substance of a treaty.

The objective of an international convention on the rights of persons with disabilities is to elaborate enforceable standards and implementation procedures that enable persons with disabilities to exercise the human rights and fundamental freedoms to which all human beings are entitled. Grounded in the primary human right to live and to exist freely, a convention must embody the values of equality, liberty, independence, dignity, self-determination, social solidarity, personal autonomy, and non-discrimination. Standards inferior to those contained in any other human rights treaty, including general and specialized treaties, must not be accepted. The authority of a convention must be clearly established so that it has recognized precedence over other UN instruments pertaining to disability that were developed earlier and may have outdated or conflicting concepts or weaker provisions.

The development, implementation and monitoring of a treaty must be undertaken by States with the fullest possible participation of people with disabilities through their representative organizations. Such representation should include parents of people with intellectual disabilities who are unable to represent themselves. Deliberate efforts must be taken to ensure that the situation of all disability groups, and the diverse conditions related to gender, race, color, age, ethnic and other considerations, are taken into full account during the drafting process. Furthermore, special attention should be paid to all the perspectives and conditions of persons with disabilities in developing countries and countries in transition. A convention should build on the existing positive human rights achievements in the disability field. For instance, in seeking implementation measures, valuable existing resources, such as the Standard Rules and the World Programme of Action, should be used as reference tools.

A convention must address a broad array of issues to achieve the goal of enabling persons with disabilities to exercise the human rights and fundamental freedoms to which all human beings are entitled. These include, but may not be limited to, the right to:

- Life
- Freedom of association in public and private life
- Vote by secret ballot and engage fully in the political process
- Citizenship, immigration and asylum
- Transportation
- Housing
- Employment, Social Security, Income Maintenance
- Health care
- Education
- Rehabilitation
- Assistive Technology
- Vocational training
- Culture and leisure
- Access to public and private services
- Access to the built environment
- Access to the virtual environment (communications and information technology)
- Access to public and social facilities

Of particular concern are the following issues:

- Freedom from forced intervention in the name of treatment
- Freedom from involuntary institutionalization on account of real or perceived disability
- Identification of deaf- blind individuals and assurance that their service needs are met
- The right to communicate in any means suitable to the individual
- The right to use sign language and have it officially recognized
- Official recognition of Braille as the written language of blind

In order to assist developing countries in complying with the required standards within a suitable period of time, implementation provisions within the treaty text should include mechanisms to provide technical and other assistance. In addition, a convention must include a strong monitoring and enforcement system that allows for the hearing and prosecution of complaints by individuals with disabilities, disability advocates and states rights bodies on behalf of groups or classes of persons with disabilities. Finally, it must be recognized that legal standards alone will not change attitudes towards persons with disabilities among the general public. Therefore, provisions regarding public education and training should be part of a treaty so that all people are sensitized to the issues pertaining to the large population of persons with disabilities.

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Certain concepts and portions of this paper borrow heavily from documents prepared during the Experts Meeting on the Comprehensive and Integral International Convention to Promote and Protect the Rights and Dignity of Persons with Disabilities held in Mexico City, June 11-14, 2002. These include primarily documents authored by Lindqvist et al, Quinn et al and Nordstrom. While these papers may include issues not highlighted here by IDA, this should not be interpreted as a lack of support for these points by IDA and its member organizations. The issues that were included in this IDA document were chosen because they are regarded by the member organizations as paramount and of uncompromising importance.

IDA Chairperson: Kicki Nordstrom, president, World Blind Union, E-mail: [kicki.Nordstrom@iris.se](mailto:kicki.Nordstrom@iris.se)

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Inclusion International Publication: La voie vers des écoles intégrées, Bruxelles: Inclusion International 1998.

Les dispositifs de l'adaptation et de l'intégration scolaires dans le premier degré Ccirc. No. 2002-113 du 30 avril 2002- B. O. no. 19 du 9 mai 2002 p. 1271.

Scolarisation des élèves handicapés dans les établissements du second degré et développement des unités pédagogiques d'intégration (UPI) Cir. No. 2001-035 du 21-2-2001 – B.O. no. 9 du 1er mars 2001.

Scolarisation des enfants handicapés à l'école primaire. Classes d'intégration scolaire Circulaire 91-304 du 18 nov. 1991 – B.. no. 3 du 16 janv. 92.

Les origines des services d'éducation spéciale catégorielles dans les écoles, et un rationnel pour les transformer.

## Annotated English Language Literature Bibliography

### Assessment

Prater, G. E., Minner, S. E., Islam, M. E., & Hawthorne, D. 1997. *New hopes, new horizons: The challenges of diversity in education. Proceedings of the biennial international conference of the international association of special education (5th, Capetown, South Africa, August 3-8, 1997)*. U.S.; Arizona.

This collection of 64 papers from a 1997 international conference of special educators focuses on the challenges of diversity in education. Topics of the papers include: (1) assessment strategies for individuals with autism; (2) self-determination strategies for at-risk youth with learning, behavior, and emotional disabilities; (3) developing standards for professionals working with students with exceptionalities; (4) cooperative teaching and creating effective teams; (5) inclusive education implications for gifted youth; (6) dealing with test anxiety and underachievement of students with special needs; (7) inclusion of young children with disabilities; (8) developing collaborative partnerships in higher education; (9) a systemic approach to special education; (10) formative rhythmic; (11) tracking techniques used in the remedial teaching of writing; (12) intervention strategies for at-risk high school students; (13) teaching self-management to students with diverse needs; (14) diagnosis and remediation of early reading difficulties; (15) educator resistance and acceptance of inclusion; (16) developing effective school-to-work models for students with autism spectrum disorders; (17) educational software; (18) a conceptual model of diversity; (19) young volunteers with disabilities; (20) low-income preschool programs in Korea; (21) effects of cognitive awareness training on boys with attention deficit hyperactivity disorder (ADHD); (22) identification of deafness; (23) the implication of Vygotsky's theory for the assessment of disadvantaged learners; (24) funding special needs and diversity programs; (25) the improvement of the creativity of children with deafness; (26) culturally relevant partnerships between families and professionals; (27) responsibility and self-esteem; (28) early intervention program development; (29) the roles of paraeducators in special education; (30) turning cultural diversity into multiculturalism; (31) pursuing goal setting and career development to improve self-esteem and academic achievement; (32) learning styles and culturally diverse students with special needs; (33) comorbidity of ADHD in adults with mental retardation; (34) attitudes toward critical thinking among students enrolled in teacher education programs; (35) a transdisciplinary assessment model for children with ADHD; (36) special educator needs in working with students with emotional disturbances; (37) regular and special education teacher training; (38) enhancing resiliency in families of preschool children; (39) preschoolers' knowledge of mathematics; (40) teachers' perceptions of their influence in the psycho-emotional development of their students; (41) comparison of Canadian and Chinese teachers' perceptions and attitudes toward social integration; and (42) raising awareness of disabilities and promoting social integration of children with disabilities in elementary schools. (Papers include references.) (CR)

Alexander, R. Broadfoot, P. Phillips, D., ed. 1999. *Contexts, Classrooms and Outcomes*. Vol. 1, *Learning from Comparing: New directions in comparative educational research*. oxford: Symposium Books.

Provides descriptive analysis of various methods for comparing pupil achievement in cross-country studies.

Cahalan, C., Mandinach, E., Camara, W. 2002. *Predictive Validity of SAT I: Reasoning Test for Test-Takers with Learning Disabilities and Extended Time Accommodations*. New York: College Entrance Examination Board.

Provides discussion and analyses of various test-taking accommodations for students with disabilities.

Losen, D. J., Orfield, G., ed. 2002. *Racial Inequity in Special Education*. Cambridge: Harvard Education Press.

Includes chapters by Thomas Hehir, Artiles and other well-known scholars in US education. Covers law, disability, race, and high-stakes testing among other topics.

Mebrahtu, M., Crossley, M., Johnson, D., ed. 2000. *Globalisation, Educational Transformation and Societies in Transition*. Oxford: Symposium Books.

Chapters of interest include Groves and Johnson's "Education for All? Transforming Educational Provision

for the Inclusion of Street Children in Brazil" and Smith's chapter on "Transforming Education through Donor Funded Projects: how do we measure success?"

Philipsen, M., ed. 2000. *Assessing Inclusion: Strategies for Success*. Edited by M. Overman, *Hot Topics Series*. Bloomington: Phi Delta Kappa International.

Contains data on inclusion outcomes in the US from several studies, and provides case histories of effective inclusion practice.

### Country Studies

Abosi, O. C. 2000. Trends and issues in special education in Botswana. *Journal of Special Education*, 34(1), 48-53.

This article discusses provision of special education services in Botswana, mainstreaming students with disabilities, early childhood education of children with disabilities, teacher training services, teaching styles, and rehabilitation of people with disabilities in Botswana. The nine principles of the National Policy on Care for People with Disabilities are listed. (Contains references.) (CR) SUBJECT(S)

Andrews, L. M. 2002. More choices for disabled kids: Lessons from abroad. *Policy Review*, 112, 41-52.

Describes how various European countries are providing school choice for students with learning disabilities, focusing on the experiences of the Netherlands, Sweden, and Denmark, each of which has adopted school choice as part of its national educational policy, with very different provisions in the area of special education. The paper also examines the impact of inclusive education on academic achievement. (SM) SUBJECT(S)

Arbeiter, S., & Hartley, S. 2002. Teachers' and pupils' experiences of integrated education in Uganda. *International Journal of Disability, Development and Education*, 49(1), 61-78.

A study examined the views of 28 teachers in Uganda about their needs for training and support regarding the tasks of teaching children with disabilities in general education classrooms. Results found that despite high teacher-pupil ratios and the lack of resources and training, many teachers had positive attitudes toward integration. (Contains references.) (CR) SUBJECT(S)

Balboni, G., & Pedrabissi, L. 2000. Attitudes of Italian teachers and parents toward school inclusion of students with mental retardation: The role of experience. *Education and Training in Mental Retardation and Developmental Disabilities*, 35(2), 148-159.

Variables influencing the attitudes of 678 teachers and 847 parents of students without disabilities toward the inclusion of students with mental retardation were investigated. Special education teachers were the most favorable, teachers with inclusion experience had a more positive attitude, and parents with average-to-high socioeconomic status were more favorable. (Contains references.) (Author/CR) SUBJECT(S)

Bartolo, P. A. 2001. Recent developments in inclusive education in Malta. *Mediterranean Journal of Educational Studies*, 6(2), 65-91.

Examines recent developments in Malta's inclusive education policy, discourse, and practice, noting the influence of United Nations policies, local political developments, parent associations, a National Commission for Persons with Disabilities, and a nongovernmental organization for persons with developmental disabilities. Discusses the development of the National Minimum Curriculum and the recent report of the Working Group on Inclusive Education in Malta. (SM) SUBJECT(S)

Baza, J., Vaz, R. d. C. A., Millan, E., & Almeida, R. 2002. Educational building in Latin America. *PEB Exchange*, 45, 15-23.

Presents articles describing recent developments in three Latin American countries (Chile, Brazil, and Venezuela) to expand public education facilities, along with a report on UNESCO's recent seminar in Latin America on architecture for an inclusive education. (EV) SUBJECT(S)

Dei, G. J. S., & James, I. M. 2002). Beyond the rhetoric: Moving from exclusion, reaching for inclusion in Canadian schools. *Alberta Journal of Educational Research*, 48(1), 61-87.

A 3-year study in Toronto (Ontario) schools examined educational practices that engender exclusion or inclusion, especially of racially marginalized groups. Findings suggest that an inclusive learning environment introduces topics of race, critically examines cultural stereotypes, has high expectations for minority students, encourages cultural-identity groups, and has equitable school hiring practices. (Contains 52 references.)(TD) SUBJECT(S)

Bellamy, C. 1999. *The state of the world's children 1999*: UNICEF.

Deng, M., & Manset, G. 2000. Analysis of the "learning in regular classrooms" movement in China. *Mental Retardation*, 38(2), 124-130.

Description of the development of the "Learning in Regular Classrooms" effort in China to educate students with disabilities focuses on outcomes such as a major increase in the enrollment of students with disabilities and greater involvement of educators and parents in special education and on such challenges as the development of effective inclusive programming. (Contains extensive references.) (Author/DB) SUBJECT(S)

Booth, T., & Black-Hawkins, K. 2001. *Developing learning and participation in countries of the south: The role of an index for inclusion*: UNESCO.

Eleweke, C. J. 2002. A review of issues in deaf education under Nigeria's 6-3-3-4 education system. *Journal of Deaf Studies and Deaf Education*, 7(1), 74-82.

This article examines issues affecting the education of people with deafness under Nigeria's 6-3-3-4 system of education. The system was introduced in 1976 and serves all categories of learners in Nigeria. Evidence indicates that the implementation, including in schools for the deaf, has been unsatisfactory and problems are discussed. (Contains references.) (CR) SUBJECT(S)

Engelbrecht, P., Howell, C., & Bassett, D. 2002. Educational reform and the delivery of transition services in South Africa: Vision, reform and change. *Career Development for Exceptional Individuals*, 25(1), 59-72.

This paper describes the problems that individuals with disabilities in South Africa have experienced in accessing educational and support services in the transition from school to work. It outlines needed changes, including making a paradigm shift, developing a new policy and legislative framework, building an inclusive education system and redefining the nature and focus of service delivery. (Contains references.) (Author/DB) SUBJECT(S)

Ferguson, D. L. E. 1998. Crossing borders: Learning from inclusion and restructuring research in Sweden, Denmark, Norway, and the United States. *International Journal of Educational Research*, 29(2), 87-166.

The seven chapters of this theme issue focus on efforts in four countries to understand and improve the experiences of students traditionally defined as having disabilities or special needs. The chapters include a discussion of the language of special education reform and accounts of inclusion-related issues in Sweden, Denmark, Norway, and the United States. (SLD) SUBJECT(S)

Fletcher, T. V., & Kaufman de Lopez, C. K. 1995. A Mexican perspective on learning disabilities. *Journal of Learning Disabilities*, 28(9), 530-534,544.

Trends in Mexico concerning integrating children with special needs into general classrooms and a new model of service delivery providing greater site-based approaches to educating students with learning disabilities are

discussed. Assignments and materials may be modified, and both resource rooms and specialists are available to the general classroom teacher. (SW) SUBJECT(S)

Gaad, E. E. N. 2001. Educating children with Down's Syndrome in the United Arab Emirates. *British Journal of Special Education*, 28(4), 195-203.

A study investigated teacher and parent attitudes in the United Arab Emirates toward children with Down syndrome and educational services provided for them. Despite positive attitudes toward the inclusion of children with special educational needs in mainstream schools, the study found barriers toward the inclusion of children with Down syndrome. (Contains references.) (CR) SUBJECT(S)

Jelas, Z. M. 2000. Perceptions of inclusive practices: The Malaysian perspective. *Educational Review*, 52(2), 187-196.

Interviews with special education and mainstream teachers in Malaysian elementary schools and parents of special needs students found that teachers maintained discrete role boundaries. Parents were more positive about social benefits, acceptance, and treatment of their children in inclusive classrooms. (SK) SUBJECT(S)

Kang, Y.-S., Lovett, D., & Haring, K. 2002. Culture and special education in Taiwan. *Teaching Exceptional Children*, 34(5), 12-15.

This article discusses results of two recent surveys in Taiwan. Survey results indicate 99 percent of preschool program directors (n=134) believe they cannot provide services to certain children because of inadequate qualified personnel or lack of appropriate facilities and parents (n=109) of young children with disabilities face many problems. (Contains references.) (CR) SUBJECT(S)

Meadan, H., & Gumpel, T. P. 2002. Special education in Israel. *TEACHING Exceptional Children*, 34(5), 16-20.

This article describes changes taking place in Israeli special education. It discusses the goals of special education, diagnosis and placement, special education procedures, criticism of the special education law, and the current status of special education in Israel. The movement towards increased inclusion is highlighted. (Contains 7 references.) (CR) SUBJECT(S)

Mittler, P. 2002. Educating pupils with intellectual disabilities in England: Thirty years on. *International Journal of Disability, Development and Education*, 49(2), 145-160.

This article highlights major developments in the education of children with intellectual disabilities in light of an early review of progress and problems and subsequent reforms to the education system as a whole. Key issues include access to the National Curriculum, prospects for inclusive education, and implications for professional development. (Contains references.) (Author/CR) SUBJECT(S)

Riddell, S. Brown, S., ed. 1994. *Special educational needs in the 1990s: Warnock in the market place*. London and New York: Routledge.

An excellent review of inclusive education history and practice in the United Kingdom.

Save-the-Children. 1995. *In our own words: disability and integration in Morocco*. London: Save the Children.

Describes experiences with community-based rehabilitation in the Moroccan context.

Wong, D. K. P. 2002. Struggling in the mainstream: The case of Hong Kong. *International Journal of Disability, Development and Education*, 49(1), 79-94.

A study examined the accounts of parents of 515 Hong Kong students with special needs of their children's experiences. Academic requirements were found to be a great burden to children and parents. Children with

intellectual impairments, autism, and hyperactivity encountered more problems in peer relationships. (Contains references.) (CR) SUBJECT(S)

Zindi, F. 1996. Mainstream children's attitudes towards integration with the disabled in Zimbabwe's secondary schools. *African Journal of Special Needs Education*, 1(1), 1-7.

A questionnaire of 500 pupils (ages 16-17) in Zimbabwe investigated their attitudes toward being integrated with students with disabilities. Results showed the students had more positive attitudes towards integration of students with disabilities than negative ones. No significant differences were found in attitudes of female and male students. (Author/CR) SUBJECT(S)

### **Early Childhood and Parenting**

Carlson, H. L., & Karp, J. M. 1997. Integration in early childhood programs in three countries. *International Journal of Early Years Education*, 5(2), 107-117.

Used grounded theory to study programs integrating special needs children in preschool classrooms. Found that the core variable emerging from comparative analysis was the role of assistant teacher; across all programs, the assistant assumed a primary caregiver relationship with the child, engaged in teaming with other teachers, and interacted with parents in mutually supportive ways. (EV) SUBJECT(S)

Mutua, N. K. 2001. Importance of parents' expectations and beliefs in the educational participation of children with mental retardation in Kenya. *Education and Training in Mental Retardation and Developmental Disabilities*, 36(2), 148-159.

A study involving 351 Kenyan children with mental retardation found six predictors of educational participation: parents' beliefs about appropriateness of education for the child, about social acceptance of the child, about segregation, and about worthlessness of education of children with mental retardation, parents' level of education, and importance of school characteristics. (Contains references.) (Author/CR) SUBJECT(S)

Quah, M. M. 1997. Family-centered early intervention in Singapore. *International Journal of Disability, Development and Education*, 44(1), 53-65.

This paper describes Project ASSIST, an early intervention pilot project involving 40 Singaporean infants with disabilities (ages 2-5) that integrated children with mild disabilities into mainstream preschool centers. Results indicated high levels of peer and school personnel acceptance and the feasibility of integrating children with disabilities into mainstream preschools. (Author/CR) SUBJECT(S)

### **Employment**

Centre-for-Educational-research-and-innovation. 1997. *Post-compulsory Education for Disabled People*. Paris: OECD.

Cross-national study and analysis of issues related to higher education for people with disabilities. Includes information technology and recommendations for ways forward.

OECD. 1994. *Disabled Youth and Employment*. Paris: Organisation for Economic Co-operation and Development.

Focuses on the need for Transition Services and provides recommendations for promoting effective transition from school to work. Provides examples and special issue chapters on labor market policies and supported employment for people with severe disabilities.

———. 2003. *Transforming Disability into Ability: Policies to promote work and income security for disabled people*. Paris: OECD.

A must read for up-to-date information on work and income security for disabled people. A cross-national study with a lot of hard data. Contains an extensive bibliography with other recent literature, pp. 171-176.

### Policy

Ainscow, Mel. 1999. *Understanding the Development of Inclusive Schools*. London: Falmer Press.

Describes the process of development in IE. Uses vignettes from developing countries.

Armstrong, F., Armstrong, A., Barton, L., ed. 2000. *Inclusive Education: Policy, Contexts and Comparative Perspectives*. London: David Fulton Publishers.

Chapters by disability scholars analyze the progress of inclusion in various countries: France, England, Greece, Ireland, Sweden, US.

Armstrong, F., Barton, L., ed. 1999. *Disability, Human Rights and Education*. Edited by L. Barton, *Disability, Human Rights and Society*. London: Open University Press.

Disability scholars provide insights on educational reform for people with disabilities in various countries, including Zimbabwe, Bangladesh, China, Trinidad and Tobago.

Bellamy, C. 1999. *The state of the world's children*. 1999: UNICEF.

Booth, T., & Black-Hawkins, K. 2001. *Developing learning and participation in countries of the south: The role of an index for inclusion*: UNESCO.

Chubbott, C. 2003. *Constructing Education for Development: International Organizations and Education for All*. Edited by E. R. Beauchamp, *Reference Books in International Education*. New York and London: RoutledgeFalmer.

Contains an interesting critique of donor agencies and their history of involvement in funding education.

Christensen, C., Rizvi, F., ed. 1996. *Disability and the Dilemmas of Education and Justice*. Buckingham: Open University Press.

Chapter authors discuss disability, equity, inclusion, from international perspectives.

Finn, C., Rotherham, A. J., Hokanson Jr., C., ed. 2001. *Rethinking Special Education for a New Century*. Washington, D.C.: Thomas B. Fordham Foundation.

Covers several hot topics in special education, including law, funding, policy, race and inequality from a US perspective.

Giangreco, M. F. 1997. Key lessons learned about inclusive education: Summary of the 1996 Schonell Memorial Lecture. *International Journal of Disability, Development & Education*, 44(3), 193-206.

This article summarizes some of the primary content presented in the Sixteenth Schonell Memorial Lecture at The University of Queensland on July 29, 1996. The content addressed 4 major topics related to the education of students with disabilities in general education classrooms with support, including (1) characteristics of inclusive education, (2) key lessons learned about inclusive education, (3) tools to facilitate inclusion, and (4) the impact of inclusion on students with disabilities as well as their classmates without disabilities, teachers, and families. (PsycINFO Database Record (c) 2002 APA, all rights reserved): Class Descriptors: 3570 Special & Remedial Education

Griffin, Rosarii, ed. 2002. *Education in Transition: International perspectives on the politics and processes of*

*change*. Oxford: Symposium Books.

Contains case studies from countries in conflict and other developing countries, including a chapter on integrating segregated schools in Northern Ireland.

Harber, Clive. 2001. *State of Transition: Post-Apartheid Educational Reform in South Africa*. Oxford: Symposium Books.

Contains chapters on curriculum and assessment, policy, finance and governance, the culture of teaching and learning and teacher identity.

Katzenbach, D., Rauer, W., Schuck, K. D., & Wudtke, H. 1999. Die integrative grundschule im sozialen Brennpunkt. Ergebnisse empirischer Langsschnittuntersuchungen des Hamburger Schulversuchs (the integrative elementary school at the focus of the social debate). *Zeitschrift für Pädagogik*, 45(4), 567-590.

Presents results of a study of the school experiment "Integrative Elementary School" carried out in Hamburg (Germany) that aimed at keeping children with learning, language, or behavioral problems in the (regular) elementary school, which is furnished with additional teachers trained in special education. (CMK) SUBJECT(S)

Kavale, K. A. 2002. Mainstreaming to full inclusion: From orthogenesis to pathogenesis of an idea. *International Journal of Disability, Development and Education*, 49(2), 201-214.

This article traces the trend towards greater integration of students with disabilities into general education from its origins in mainstreaming to the present call for full inclusion. A review of research concludes that the necessary attitudes, accommodations, and adaptations are not yet in place for full inclusion. (Contains references.) (Author/CR) SUBJECT(S)

Lomofsky, L., & Lazarus, S. 2001. South Africa: First steps in the development of an inclusive education system. *Cambridge Journal of Education Special Issue: International Perspectives on School Reform and Special Educational Needs*, 31(3), 303-317.

Traces the development of policy and legislation since 1994, which marked the introduction of a unitary non-racial system of education and training in South Africa. Policy development in this context has been guided by the universal principles of a human right to basic education, equality and the recognition of the democratic rights of parents, teachers and all learners, including those with disabilities. A major paradigm shift in education policy has reflected a move from a dual, special and general education system towards the transformation of general education to recognise and address the diverse learning needs of all learners. There have been several government initiatives aimed at restructuring and strengthening the general curriculum. This includes the introduction of a new national curriculum to accommodate a diverse range of system and learner needs. The most recent education policy recommends a shift in thinking about 'special needs and support services' in this country towards a commitment to the development of an inclusive education and training system. The real challenge which faces this country will be in the implementation of these recommendations. (PsycINFO Database Record (c) 2002 APA, all rights reserved): Access: <http://www.tandf.co.uk/journals/carfax/0305764X.htm> Correspondence Info: Lomofsky, Lilian. Faculty of Education, University of the Western Cape, PB X 17, Bellville, South Africa, 7535, llomofsky@uwc.ac.za Class Descriptors: 3500 Educational Psychology

Loxley, A., & Thomas, G. 1997. From inclusive policy to the exclusive real world: An international review. *Disability & Society*, 12(2), 273-291.

Metaanalysis of 62 special education policy documents & commentaries on policy implementation from the UK, Australia, & New Zealand was conducted to identify distinct ideal types of policy & policy realization. Eight ideal types (eg, democratization, decentralization, & professionalization) were identified, & how the Queensland & Victoria policies demonstrate these types are used in illustration. Progressive policies that promote inclusive education for students with disabilities are typically rejected by practitioners & the policy's progressiveness becomes truncated in practice. Tensions are evident when both demand for decentralization & accountability to a standard

occur in the same policy, since accountability to a standard is assisted by centralization of procedures & evaluation. 36 References. Adapted from the source document

McLeish, E. A., Phillips, D., ed. 1998. *Processes of Transition in Education Systems*. Edited by D. Phillips, *Oxford Studies in Comparative Education*. Oxford: Symposium Books.

Discusses problems and processes of educational development, with examples from South Africa, Latvia, and East Germany.

Parrilla, A. 1999. Educational innovations as a school answer to diversity. *International Journal of Inclusive Education*, 3(2), 93-110.

Reports ongoing research analyzing types of educational innovation created by schools in Seville, Spain, to address diversity issues. So far, schools are not fully integrated, and teaching practices have not changed very much. The schools most experienced with integration are more innovative. Classroom organization and management have become more inclusive. Contains 21 references. (MLH) SUBJECT(S)

Peters, S., ed. 1993. *Education and Disability in Cross-Cultural Perspective*. Edited by B. Edward R, *Reference Books in International Education*. New York: Garland Publishing, Inc.

Includes analyses of special education in countries of Iran, Hungary, Pakistan, China, UK and US. Includes a cultural cross-comparative framework for study of education and disability.

*Salamanca five years on: A review of unesco activities in the light of the salamanca statement and framework for action on special needs education*. Corp author(s): United Nations Educational, Scientific, and Cultural Organization, Paris (France). Special education. 1999. France.

This report is a review of effects of the Salamanca Statement and Framework for Action, a product of representatives of 92 governments and 25 international organizations who attended the 1994 World Conference on Special Needs Education: Access and Quality. It reports that UNESCO has been disseminating the recommendations from the Salamanca World Conference and has assumed a catalytic role in disseminating ideas and practices concerning meeting special educational needs within the regular educational system. The main thrust of UNESCO's efforts has focused on developing national capacities for policymaking and systems management in support of inclusive education and bringing forward the concerns of people with disabilities, as well as other marginalized groups, on the wider educational agenda and on the agendas of international development organizations. Separate sections report on activities, accomplishments, and publications concerned with building capacities for educational change, human resource development, inclusive schools and community support programs, inclusion on the wider education agenda, and information, networking, and dissemination. (Contains 13 resources.) (DB)

Thomas, L. R. 1996. A South African assistant principal takes a look at some U.S. Schools. *NASSP Bulletin*, 80, 78-83.

A visiting Fulbright scholar/principal from Capetown, South Africa, spent a semester observing elementary, middle, and high school classes in the eastern United States. His observations about student absenteeism, school counselors, discipline, inclusive programs, transportation modes, and library facilities evoke contrasting images of daily school life in South Africa. (MLH) SUBJECT(S)

Vitello, S. J. E., Mithaug, D. E. 1998). *Inclusive schooling: National and international perspectives*. Mahwah, NJ: Lawrence Erlbaum.

cover: This book provides new information on how various inclusion policies have been implemented in different schools and school districts in North America and in a range of European countries. /// The purpose of inclusion policy is to prevent the marginalization of people who experience unfavorable circumstances in life. It is an approach to the education of students with disabilities that is based on a commitment to what all members of a free society deserve in order to become fully participating members--a fair chance to find a meaningful place in their own communities. /// This book is a kind of status report on what inclusive education has achieved and what it may

achieve in the future for children and youth with disabilities. It describes the philosophical, legal, and practical terrain covered by inclusion policy in general and inclusive schooling in particular. Contributors assess inclusion policy and suggest ways to reconceptualize it, bringing to their data analysis a depth of experience and knowledge about public schooling in their respective countries. (PsycINFO Database Record (c) 2002 APA, all rights reserved):

Wastson, K., ed. 2001. *Doing Comparative Education Research: issues and problems*. Oxford: Symposium Books.

Evaluates various education development projects. One chapter of interest by Juan Navarro: "Learners' Diversity: the integration of Maghrebi children in mainstream classrooms in Spain."

### **Teacher Training**

Alexander, R., Osborn, M., Phillips, D., ed. 2000. *Policy, Professionals and Development*. Vol. 2, *Learning from Comparing: New directions in comparative educational research*. oxford: Symposium Books.

Descriptive analyses of cross-cultural studies in teacher education.

Chimedza, R., Peters, S., ed. 2001. *Disability and Special Needs Education in an African Context*. Harare: College Press Publishers (Pvt) Ltd.

An excellent text for pre-service teachers and for professional development of practicing teachers. Contains chapters by school teachers with disabilities, with many practical strategies for accommodating student sin classrooms, plus insights from disability activists on attitudinal change that is needed.

Craig, H., Kraft, R., du Plessis, J. 1998. *Teacher Development: Making an Impact*. Edited by W. B. H. D. Network, *Effective Schools and Teachers*. Washington, D.C.: World Bank.

Includes case studies from Botswana, Namibia, Bangladesh, Guatemala. Provides lessons learned and recommendations for teacher preparation and ongoing professional development.

Hedegaard, M., ed. 2001. *Learning in Classrooms: A Cultural-Historical Approach*. Oxford: Aarhus University Press.

Contains a chapter on gendering of social practices in special needs education. Also contains chapters on diversity in learning modes in classroom contexts.

Heiman, T. 2001. Inclusive schooling-middle school teachers' perceptions. *School Psychology International*, 22(4), 451-462.

Overviews Israeli middle school teachers' perceptions regarding inclusive schooling. The majority of teachers expressed the need to increase their knowledge about the requirements of students with learning disabilities and evinced their readiness to adjust their teaching methods. Teachers also stressed the need for professional guidance and adequate tools and conditions. (Contains 31 references and 2 tables.) (GCP) SUBJECT(S)

Houtveen, T., & Van de Grift, W. 2001. Inclusion and adaptive instruction in elementary education. *Journal of Education for Students Placed at Risk*, 6(4), 389-409.

Investigated developments in inclusion and adaptive instruction in Dutch elementary schools over time. Survey data indicated that partnerships between regular and special education schools and school policies on teacher professional development were implemented with increasing consistency. Use of differentiated instruction and adapted curriculum increased. School- and regional-level facilitative measures fostered implementation of school-level inclusion, which fostered adaptive instruction. (SM) SUBJECT(S)

Lee, S. B., Kim, J., Lee, S. H., & Lee, H.-S. 2002. Encouraging social skills through dance: An inclusion program in Korea. *Teaching Exceptional Children, 34*(5), 40-44.

Two American teachers in a Korean school used their expertise with song and dance to teach social skills to an inclusive group of kindergartners. The group of 10 included three children with disabilities. The children with disabilities showed behavior changes in both appropriate response behaviors and inappropriate response behaviors. (Contains references.) (CR) SUBJECT(S)

McConkey, R. 2001. *Understanding and responding to children's needs in inclusive classrooms: A guide for teachers*: UNESCO.

Meyer, L. H. 2001. The impact of inclusion on children's lives: Multiple outcomes, and friendship in particular. *International Journal of Disability, Development and Education, 48*(1), 9-31.

This article shares findings from the work of a Consortium for Collaborative Research on the Social Relationships of Children and Youth Diverse Abilities. It discusses findings from several research studies on children's social lives in inclusive settings, while weaving a theme throughout the presentation of how the research was done. (Contains references.) (Author/CR) SUBJECT(S)

Moberg, S., Zumberg, M., & Reinmaa, A. 1997. Inclusive education as perceived by prospective special education teachers in Estonia, Finland, and the United States. *Journal of the Association for Persons with Severe Handicaps, 22*(1), 49-55.

A survey of 125 prospective undergraduate special education in Estonia, Finland, and the United States found the Estonians were most critical of inclusion and the Finns the least critical. Results suggest that prospective teachers' perceptions about inclusion are related to the prevailing implementation of inclusive education in their countries. (Author/DB) SUBJECT(S)

Opdal, L. R., Wormnaes, S., & Habayeb, A. 2001. Teachers' opinions about inclusion: A pilot study in a Palestinian context. *International Journal of Disability, Development and Education, 48*(2), 143-162.

A study explored Palestinian teachers' (n=90) opinions on inclusion in primary schools. Fifty-four believed that students with disabilities and special needs should have an opportunity to attend public schools. Eighty-one expressed a need for change in the public schools in order to meet the needs of students with disabilities. (Contains references.) (Author/CR) SUBJECT(S)

Palladino, P., Cornoldi, C., Vianello, R., Scruggs, T. E., & Mastropieri, M. A. 1999. Paraprofessionals in Italy: Perspectives from an inclusive country. *Journal of the Association for Persons with Severe Handicaps, 24*(4), 254-258.

A survey of 37 educators in 14 Italian schools examined the roles of paraprofessionals. Results indicated that paraprofessionals were relied upon far less than in the United States and that respondents thought that paraprofessionals should work primarily on motor and self-help/autonomy skills. Most expressed skepticism about use of paraprofessionals for teaching. (Contains references.) (CR) SUBJECT(S)

Pecek, M. 2001. Integration versus segregation--the case of Slovenia. *Mediterranean Journal of Educational Studies, 6*(2), 45-64.

Analyzes the discourse used when dealing with educational integration via legislation, highlighting philosophical and political solutions used as the basis for new legislation regarding education for children with

special needs in Slovenia. Emphasizes the importance of considering parent, teacher, and student attitudes toward inclusive education and the need to prepare educators to teach in inclusive classrooms. (SM) SUBJECT(S)

Peetsma, T., Vergeer, M., Karsten, S., & Roeleveld, J. 2001. Inclusion in education: Comparing pupils' development in special and regular education. *Educational Review*, 53(2), 125-135.

Comparison of matched pairs of elementary students in mainstream and special education showed that, after 2 years (n=504), students with disabilities achieved more in math in regular education; motivation was higher in special education. After 4 years (n=216), those in regular education had progressed more academically than those in special education. (Contains 23 references.) (SK) SUBJECT(S)

Reynolds, M. Education for inclusion, teacher education and the teacher training agency standards. *Journal of In-service Education*, 27(3), 465-476.

Outlines the implications of education for inclusion in the United Kingdom, noting the complexities of providing inclusion in the school context, critically evaluating the approach to teacher development espoused by the Teacher Training Agency (TTA), and highlighting inadequacies in this approach regarding inclusion and ramifications for the TTA stance toward faculty development. (SM) SUBJECT(S)

Roll-Pettersson, L. 2001. Teacher perceptions of supports and resources needed in regard to pupils with special educational needs in Sweden. *Education and Training in Mental Retardation and Developmental Disabilities*, 36(1), 42-54.

A study compared resources and supports expressed as being available and in need of change among 39 Swedish teachers with pupils in integrated and segregated school environments in relation to inclusion. Regardless of educational setting, teachers perceived strong needs for regular and ongoing inservice training and access to university courses. (Author/CR) SUBJECT(S)

Stough, L. M. 2002. Teaching special education in Costa Rica: Using a learning strategy in an inclusive classroom. *TEACHING Exceptional Children*, 34(5), 34-39.

In the past decade, special education in Costa Rica has seen profound changes from creating primarily segregated services to developing innovative service models that promote inclusion. This article describes those changes and takes a look at current challenges in this small country, including teacher shortages and adequate funding. (Contains references.) (CR) SUBJECT(S)

Transnational-Competence-Task-Force. 1997. *Towards Transnational Competence: Rethinking international education*. New York: Institute of international Education.

A US-Japan Case study with recommendations for improving international education. Includes hot topics of tertiary education and organization linkages.

UNESCO. 2001. *Understanding and Responding to Children's Needs in Inclusive Classrooms*. Paris: UNESCO.

An excellent hands-on guide for teachers to promote inclusive practices in classrooms.

Vlachou, A. 1997. *Struggles for Inclusive Education: An ethnographic study*. Edited by L. Barton, *Disability, Human Rights and Society*. Buckingham: Open University Press.

Offers a detailed analysis of primary school teachers' and peers' attitudes towards integration from the viewpoint of a respected disability scholar.

### **Technology**

EURYDICE. 2003. *Special Needs Education in Europe*. Brussels: EURYDICE.

Contains a substantial section on new trends in technology and special education needs, pp. 37-48.

Stromquist, N. 2002. *Education in a globalized world: the connectivity of economic power, technology, and knowledge*. New York: Rowman and Littlefield Publishers, Inc.

Theorizes issues in globalization, including gender issues, consequences of communication technologies on culture and education.

### **Theory**

Clark, C., Dyson, A., Millward, A., ed. 1998. *Theorising Special Education*. London and New York: Routledge.

Contains chapters by Booth, Ainscow and other well-known authors, with various perspectives on the social construction of disability.

Clough, P., Corbett, J. 2000. *Theories of Inclusive Education: A Student's Guide*. London: Paul Chapman Publishing, Ltd.

The book is organized into three sections with various theories, trends and issues in inclusive education. It is an excellent text for pre-service teachers, and for professional development of practicing teachers.

Lea, S., Foster, D. 1990. *Perspectives on Mental Handicap in South Africa*. Cape Town: Butterworths Professional Publishers (Pty) Ltd.

A very comprehensive treatment of the history of medical and psycho-social roots of treatment and recommendations for change that is very forward thinking.