COMBATTING DISPARITIES IN ACCESS TO INCLUSIVE EDUCATION IN PORTUGAL, ITALY AND SPAIN

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Deliverable 5.1

A concrete methodology and new tools to facilitate the monitoring and evaluation procedure

European Agency for Special Needs and Inclusive Education

The project is funded by the European Union through the Technical Support Instrument and implemented by the European Agency for Special Needs and Inclusive Education, in co-operation with the European Commission

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INTRODUCTION

This deliverable aims to build on learning from project activities, in particular stakeholder discussions, to support the development of monitoring and evaluation at school, regional and national levels. It will focus on methodology and tools to facilitate monitoring and evaluation (M and E) procedures and enable project countries (and countries more widely) to adapt materials to their own purpose and contexts. It will include a focus on equity and inclusion that will help to address regional disparities, drawing on evidence from the European Agency for Special Needs and Inclusive Education (the Agency) and from other European and international organisations, as well as country examples.

It should be noted that research evidence suggests that models and approaches developed for use by one country cannot be directly transferred to other systems or contexts, even where apparent similarities may appear to exist. The use of tools, models and strategies are always context specific, and should be developed in relation to national, regional or local needs, within the framework of the existing system. Tools and examples of practice developed in other contexts provide an excellent basis for reflection and advice on potential challenges and solutions, and for the purposes of comparison. This point is further elaborated in Deliverable 2.3.

This deliverable of a concrete methodology and new tools is to *facilitate* the monitoring and evaluation procedure in each of the three countries. Stakeholder participation is a key aspect of this project, and the active involvement of a wide range of stakeholders from many aspects of education has enabled detailed outlines of the action plans to be codeveloped with each country. In a similar way, this deliverable has been created by the Agency as the starting point for each country to now undertake the work in a collaborative and participatory way, with their stakeholders, to ensure that all aspects of monitoring and evaluation procedures are co-developed. This approach encourages co-ownership of the processes, which in turn mean that all stakeholders are more invested in the processes and that monitoring and evaluation is closely aligned with system needs.

This deliverable will:

- Provide a conceptual background and underpinning principles for the development of M and E procedures and processes to address inclusion and equity across the education system
- Outline a clear rationale and model for policy and practice at school and regional/national levels and provide examples and indicators as a basis for further work
- Summarise key learning to assist countries in understanding and implementing a comprehensive M and E system.

Maxwell and Staring (2018) recognise the role played by strong quality assurance systems in ensuring that all learners in schools throughout Europe receive a high-quality education. However, quality needs to be 'continuously monitored and improved at all education levels' (European Commission/EACEA/Eurydice, 2015, p. 3). In the 2018 Brussels

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Declaration, UNESCO committed to strengthening the monitoring of inclusion, equity and quality, suggesting that this should include:

… optimizing education governance systems and the use of existing indicators and ensuring more disaggregated data to better track inequalities based on gender, ethnicity, language, income, disability status, migratory status and geographical location (UNESCO, 2018, p. 4).

Governments are the primary duty-bearers of the right to education (UNESCO, 2017) and monitoring and quality assurance processes are needed to ensure that they fulfil their obligations, and that all parts of the 'education ecosystem' (European Agency, 2017a) make an effective contribution towards ensuring that all learners have access to highquality inclusive education.

What is meant by monitoring and evaluation?

The OECD defines 'monitoring' as:

> The process of systematically tracking aspects of education/school implementation, with a view toward data collection, accountability and/or enhancing effectiveness and/or quality (2015, p. 235).

According to the Agency's online glossary, evaluation is:

> A systematic and objective assessment of an on-going or completed project, programme or policy, its design, implementation and results.
>
> Evaluation focuses on the macro level, considering the context of learning and related factors. Assessment measures learning at the micro or learner level and is one element of evaluation.

Monitoring and evaluation complement each other, forming a continuous process. The process starts with monitoring inputs and outputs and over time develops into 'a combination of monitoring and evaluation and thereafter increasingly into an evaluation of impact' (UNESCO, 2016, p. 40). What is critical is that M and E processes provide a clear understanding of any changes – positive or negative (Ibid.). There is no clear division between monitoring and evaluation. The emphasis throughout is, as stated above, on using findings for planning or policy formulation and continuous system improvement.

While policy and practice in M and E will vary widely among countries, the focus at different system levels may include the following:

- At national/regional level, data on learners' access to and participation in education, evidence of long-term outcomes, key policy priorities and concerns regarding equity and inclusion.
- At school level, data on quality of school life for all learners and stakeholders, e.g. valuing diversity, providing support, parental involvement, community involvement and social inclusion, leadership support for inclusive culture and building inclusive capability.

- At classroom level, organisation of learning, use of resources, teacher knowledge, skills, competences and attitudes.
- At individual level (teachers and learners), engagement in learning, academic success, personal, social and emotional well-being (adapted from Watkins & Ebersold, 2016).

M and E clearly plays an important role in developing an understanding of 'what works', but a strong conceptual background is also needed to enable stakeholders to understand the 'why' as well as the 'how' of inclusive education and to take a holistic system view with a commitment to on-going system improvement.

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CONCEPTUAL BACKGROUND TO SUPPORT MONITORING AND EVALUATION

National policy for inclusive education is often aspirational but can also be vague and noncommittal (Schuelka, 2017). Evidence shows that even where similar policies are introduced in different countries, what happens in the classroom is often very different from what policy-makers intend, with large variations between and even within schools (Haug, 2017), as well as across different national contexts. It is clear that policy created at higher levels of the system does not always fulfil intentions regarding how policies reach and benefit all learners. This then highlights that, in a learner centred and inclusive education system, M and E must also focus on the impact of laws, policies and practice on each and every learner.

To assess this impact and the achievement of all learners, an inclusive assessment framework must be in place to provide learner-level data – not only on academic attainment but also wider achievement. Beyond this, and keeping in mind the complexity of education systems, a comprehensive M and E framework is crucial for countries to know how well different elements of the system are working to support all learners and what requires improvement.

In order to develop a comprehensive monitoring system, several key points must first be addressed:

- Within legislation and policy, there must be a clear concept of equitable high quality inclusive education underpinned by core values (European Agency, 2021, p. 12). There should be a mechanism to enable stakeholders to discuss and define key terms and be involved in consistent communication about the education system at national, regional and local/school levels. A clear view of the aims and purpose of the education system is essential to support effective monitoring of developments. The issue of 'different understandings' of inclusive education was identified by UNESCO (2020) as a key challenge. Over time, the term 'inclusion' has been used to refer to learners with special educational needs, but, more recently, it has expanded 'to include all learners, regardless of their characteristics' (OECD, 2023, p. 7). However, in many countries – including those taking part in this project – it is still primarily associated with SEN/disability and therefore needs to be clarified and widely communicated. During project activities, stakeholders in Italy, Portugal and Spain recognised the need for a clear definition of inclusive education and clarity around associated terminology. Inclusive education continues to be primarily associated with learners with special educational needs and disabilities or disadvantages, even where the legislation indicates a move towards a broader approach. Given the project focus on addressing regional disparities, a common understanding of inclusive education is key to develop a more consistent approach.
- There should be a single legislative and policy framework for all learners, aligned with key international conventions – such as the United Nations Convention on the Rights of the Child (1989) and the United Nations Convention on the Rights of Persons with Disabilities (2006) – as the basis for rights-based practice (European

Agency, 2021, p. 12). Such a framework should also align with European Conventions and communications, for example EU Strategy on the Rights of the Child and EU Strategy on the rights of persons with Disabilities, Council Recommendation on promoting common values, inclusive education, and the European dimension of teaching (Council of the European Union, 2018). Inclusion and equity should be a transversal principle not a separate goal, and should inform a framework that covers all sectors of education and all levels of the education system. A rights-based approach requires a change in educational culture: from a focus on individual support to remedy 'deficits', to support for 'schools to increase their capacity and capability to respond to the diverse needs of all learners' (ibid., p. 60). This requires well-trained teachers, adequate facilities and learning materials, a flexible curriculum to ensure relevance, a good learning environment, and a clear definition and accurate assessment of learning outcomes (UNESCO, 2000) – all supported by coherent legislation and policy frameworks.

- The development of an inclusive system requires a consideration of all the interconnected elements that impact on the learner at the centre of the system (European Agency, 2017a). While it is at the school and classroom level where inclusion is ultimately successfully implemented (Carrington et al., 2017; Schuelka, 2018), other elements must be in place to support schools to develop inclusive practice. For example, the Agency (2018a) highlights six operational structures and processes necessary for the development of inclusive education: System capacity building; Governance and funding; Monitoring, quality assurance and accountability; Initial and continuing professional learning; Learning and teaching environments; Continua of support.
- Equity and inclusion cannot be achieved without collecting and analysing data on the most vulnerable learners who are at the highest risk of exclusion (OECD, 2023). Countries should 'measure what they value' and this links to the need for decisionmakers in each country to take a lead in developing a clear vision for the education system in collaboration with stakeholders. This will then enable them to select, adapt and/or develop a range of indicators that are relevant and applicable to their own country context. They should aim to ensure that the information and data gathered ensures the effective, efficient and equitable use of resources, balancing accountability and improvement.
- Within the context of inclusive education, quality provision involves effective collaboration within schools, between schools and families, and between schools and other agencies in the community that can all contribute to more effective and efficient support for all learners. Collaborative activities also require a policy context that supports and values cross-sector practice and enhances co-operation between, for example, government departments at national level and key agencies at regional level (European Agency, 2024). Effective inclusive practice depends on the active involvement of learners, parents, teachers and the wider community (European Agency, 2018b) and further benefits are gained when there is a culture of reflection along with commitment among all stakeholders to review, learn and continuously improve.

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Example indicators for some of these important areas have been drafted, based on the Key Principles published by the Agency (2021). These can be found in Annex 2.

Underpinning principles

Equitable education systems are those that ensure the achievement of educational potential regardless of personal and social circumstances, including factors such as gender, ethnic origin, Indigenous background, immigrant status, sexual orientation, gender identity, special educational needs and giftedness (Cerna et al., 2021; OECD, 2017). Monitoring and evaluation processes should enable the identification of any differences in progress towards key goals for learners that may be the result of such circumstances or due to certain structures and processes within the education system.

By highlighting disparities, possible causes can be explored and evidence-based actions planned so that any barriers may be removed. Information about gaps and challenges is therefore essential if change towards a more equitable system is to take place.

The monitoring of progress towards inclusion should be broader in focus than for equity. As well as examining equal opportunities to reach potential, 'monitoring of progress in improving inclusion should also focus on how learners feel at school, wellbeing outcomes and socio-emotional development' (OECD, 2023, p. 313).

Hudson (2016), working in the health sector, set out some key components of an 'integrated approach to accountability appropriate for cross-sector working'. The components most relevant to the current work are:

- 'a single set of outcome indicators', comprising 'some key national indicators, plus a set of local indicators agreed by the relevant parties';
- 'a coordinated approach to planning at local level, including how planning and monitoring for individual organisations fits within this strategic … approach';
- 'a high-level financial plan also agreed at local level';
- 'a common database for headline performance measures that is available to the public' (ibid., p. 3).

Adams et al. (2017, p. xi), again with a focus on shared accountability, suggest that state, district and school leaders must create a system-wide culture, grounded in 'learning to improve', and that multiple indicators of capacity for improvement (for example, effective use of data) should be added as part of every school profile. If stakeholders are to be held accountable, the capacity of all education partners to fulfil their clearly defined roles and responsibilities should be enhanced. Stakeholders should only be held accountable for the areas of the system within their authority and expertise.

Downes, Nairz-Wirth and Rusinaitė (2017), in their work on indicators, set out some principles for inclusive systems applicable to M and E. These have been adapted, drawing on recent research (European Agency, 2024), to create the following requirements:

A system-wide focus on connection and collaboration across the whole school community. This focus on cohesion and co-operation may help to address system blockages and enhance system supports (European Commission, 2018).

Attention to equality and non-discrimination, aligning to international conventions (e.g. Convention on the Rights of the Child, UN 1989, Convention on the Rights of Persons with Disabilities, UN 2006) and international and EU communications (e.g. Incheon Declaration, UNESCO, 2015; Global Education Monitoring Report, UNESCO, 2020; Council Conclusions on Inclusion in Diversity to Achieve a High-Quality Education for All, Council of the European Union, 2017; Council Conclusions on equity and inclusion in education and training in order to promote educational success for all, Council of the European Union, 2021), showing commitment to every learner's right to expression and participation, and rights to and in education.

A holistic approach that recognises learners' social, emotional and physical needs, as well as academic and cognitive needs. This would, according to Hevia and Vergara-Lope (2019), include:

- broad and fair criteria for assessing the success of education policies (beyond the outcomes of standardised tests);
- using various evaluation methodologies and results to generate formative feedback;
- considering aspects such as learner characteristics and socio-economic factors that impact on educational outcomes and that may be beyond the influence of schools and teachers.

This view is consistent with the principles outlined by the European Commission (2018) which stress the need for 'different data for '[a] balanced view' of school development and learner progress (ibid., p. 3) and the importance of ensuring that stakeholders see that evaluation primarily aims to support school development. All stakeholders' capacity should be developed to make best use of quality-assurance data and information for innovation and school and system improvement (European Commission, 2018).

Recognition of the need for multi-disciplinarity. Here, a range of professionals from different disciplines collaborate to provide for the multifaceted needs of all learners. The concept of intersectionality should be used to explore the ways in which policies consider the interaction of different identities (Palència, Malmusi & Borrell, 2014). Networking between schools and with local and wider communities can share expertise, building both social and intellectual capital (European Commission, 2018).

Representation and active participation of marginalised learners, parents and other stakeholders. Learners in particular should be listened to and concerns that affect their welfare addressed. Processes and structures should be in place to ensure their involvement, building relationships based on mutual trust and access to local information and decision-making fora (Hevia & Vergara-Lope, 2019).

In Germany, a parents' café was initiated to build a communication bridge between parents and school stakeholders. The aim was to provide a space for straightforward and direct communication, decoupled from any personal communication about learners' performances or anything related to teaching and learning. Once a week, on Fridays from 08.00 to 10.30, parents would gather in the cafeteria and bring snacks. Topics discussed included inclusive education, transition to secondary education, logotherapy, occupational therapy, leisure time, pocket money, and how to deal with the use of computer games. The project was very effective as personal exchanges between parents and teachers

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created a basis of trust and communication channels became more direct. Further examples of learner and family involvement can be found in the Voices into Action Toolkit.

A focus on **active, lifelong learning** across formal, informal and non-formal education for citizenship, personal and social fulfilment, and intercultural dialogue across communities, to increase social inclusion and employment.

A rationale for a learner focused approach

In an inclusive, rights-based education system, the learner is at the centre. M and E, therefore, should focus on the experience and achievement of all learners.

To answer the question 'how well is our education system working?', decision-makers need high-quality, reliable data/information. A systematic assessment and evaluation of the experience and achievement of all learners in every school will ultimately provide information on the legal and policy framework for education and the effectiveness of structures and processes at national/regional and school levels – and how they impact on the success of every learner.

The Structural Reform Support Programme (SRSP) work in Portugal (European Agency, European Commission's SRSP and Portuguese Ministry of Education, 2022a) noted the need to define success, going beyond academic exams. This highlights the need for an inclusive assessment framework able to record and celebrate the achievement of ALL learners, including those with very complex support needs. Achievement should include academic attainment and wider areas such as social/emotional development which form part of an agreed view of success. Data from such assessments, if to be used in school, regional and national analysis, must then be subject to moderation and validation between schools.

Teachers should be supported (through professional development and networking) to make judgements which can be shared and discussed with colleagues to improve quality and consistency. Some hard-to-measure areas of learning and development may require stakeholder input, for example, through focus groups or questionnaires, and throughout the system, stakeholders should be consulted and listened to, in particular, the voices of learners and families at school and community level.

The model introduced in this paper attempts to show how this data/information collected at learner/school level can be used for improvement and accountability throughout the education system, with an emphasis on inclusion and equity. If the progress and achievement of some learners is not captured by the assessment framework, the impact of key structures and processes on their outcomes cannot be effectively examined. If such an analysis is missing, the education system is unlikely to really include all learners.

M and E for continuous improvement – a model

As explained in the rationale above, to monitor and evaluate inclusive education at all system levels, reliable data/information on key aspects of policy and practice is crucial (European Agency, 2014).

UNESCO (2016) suggests that strong M and E systems:

> … provide the means to compile and integrate all the necessary information into the policy cycle, thus providing the basis for enabling sound governance and accountability in education policies (UNESCO, 2016, p. 23).

As well as effective and efficient governance and clear accountability, M and E needs to support continuous improvement at school, regional and national levels, with an understanding of the inter-relationship between different elements of the system.

Reinforcing the rationale above, OECD (2023) in its pointers for policy development recognises that the needs of learners should be central to policies, programmes and processes, and that a key focus should be improvements in equity and inclusion. The authors note the need to assess progress towards equity and inclusion as part of a comprehensive M and E strategy.

Overall, rather than focusing on specific elements, a more holistic view of the system is needed. In a complex system, change to one element may (intentionally or otherwise) cause changes to other parts of the system; for this reason planned actions must be considered with stakeholders and piloted and evaluated to assess such impact or possible unintended consequences.

It is clear that within such complex work there are no quick fixes and decision-makers must be realistic about priorities and timescales. Without clear priorities, there is a danger that, in trying to tackle issues across too many areas, nothing will ultimately be achieved. National, regional and school level plans must clarify levels of autonomy and set out clear roles and responsibilities. Leaders at all system levels should be provided with professional learning opportunities and support to ensure they are able to undertake the tasks allocated to them – and lead others in pursuit of agreed goals.

The figure below (Figure 1) illustrates a model[1] for M and E that focuses on on-going improvement across levels of the education system. The model corresponds to the view of the European Commission (2015) which identified a quality assurance system as:

> an integrated set of policies, activities, procedures, rules, criteria, tools and verification instruments and mechanisms that together are designed to ensure and improve the quality provided by a school institution or school system (p. 12).

These instruments and mechanisms should 'build on each other in a consistent manner' and 'be organised according to a quality assurance cycle, to realise continuous improvement' (Ibid., pp. 12–13). Most important is 'clarity in the communication of the goals, procedures and expected outcomes' of quality assurance measures, 'built on a fluent dialogue between school-level and system-level actors' (Ibid., p. 15). Hence, the model below stresses the need for feedback of key information between all levels of the education system. The tools and mechanisms needed are the subject of the next section.

[1] Based on a model developed for Supporting the Improvement of Quality in Inclusive Education – Phase II (2019–2021) action carried out in Poland in the framework of the Structural Reform Support Programme

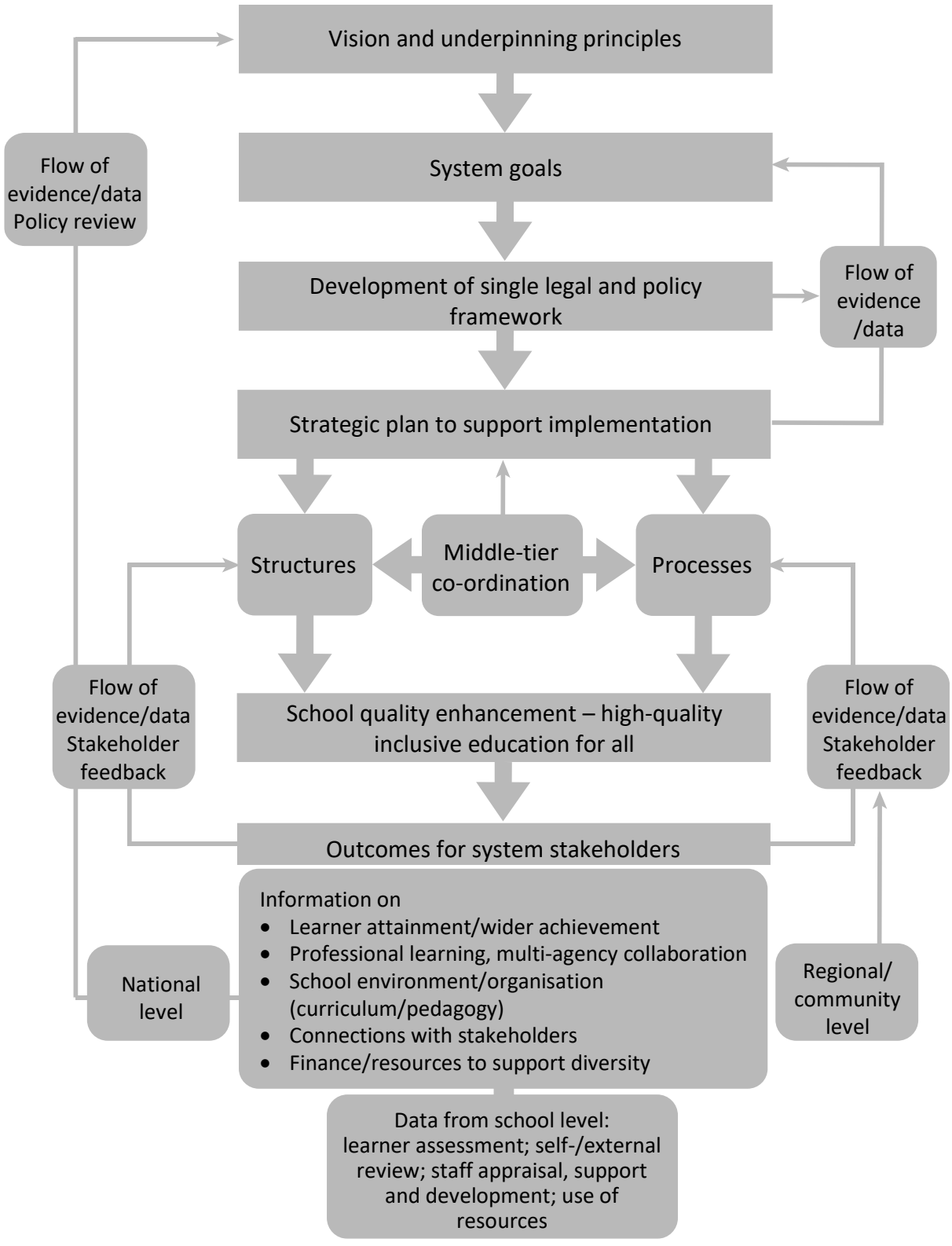

Figure 1. A model for M and E

PUTTING THE MODEL INTO PRACTICE

In recent years, there has been a shift in the development of M and E systems towards a focus on performance, rather than solely on complying with laws and regulations. The model proposed here aims to place the learner at the centre – so learner achievement and well-being are paramount and are the focus of system improvement. However, key stakeholders must also be held to account if learners' rights are not fulfilled.

In the context of increasing decentralisation of policy and practice, stakeholders in all regions/communities must be equipped with the necessary skills, knowledge and understanding to take advantage of given autonomy to better meet local needs and preferences (UNESCO, 2016). Increasing system capacity and capability is therefore also a key element of the model, which requires strong leadership to ensure that certain elements are in place to develop consistent practice across regions and communities to avoid potential inequalities.

… at national/regional level

According to the model, vision and goals for an inclusive system must be agreed with all stakeholders. During the TSI EUROCH project, stakeholders in all countries identified a lack of a clear definition of inclusive education as an issue. Even where legislation sets out such a definition, for example in Portugal, an 'implementation gap' exists, with no clear vision to guide local-level policy implementation (see project Deliverable 3.1). There is a wealth of evidence (e.g. European Agency, 2017b; European Agency, 2021) showing that unless this first step is in place – taken in consultation with the full range of education stakeholders – it is difficult to make progress in planning and implementing inclusive policy.

This first step is necessary to inform the **single legislative and policy framework** that is required to underpin an inclusive education system. Legal and policy frameworks must, however, incorporate some flexibility to take account of all learners, again requiring effective leadership throughout the system to use this flexibility to best effect while following agreed processes and procedures to increase consistency.

The successful implementation of laws and policies will depend on a **clear strategic plan**. This should outline actions, roles and responsibilities and accountability of the key personnel involved, funding/resources, timescales and monitoring.

Key actions to ensure successful implementation may include the setting up of **structures and processes**, such as cross-sector groups at national level to enable effective co-operation and co-ordination of services and support. A key task here will be the selection of indicators in line with country priorities and the key elements outlined in the model above. This is discussed in more detail later in this paper and examples which may provide a starting point for this task are included in the Annex.

Schools do not operate in a vacuum and national legislation and policy must include certain elements to support inclusive school practice. Crucial here is the role of a '**middle tier**' (for example regional/municipality level advisors) shown in the model which can play a key role in co-ordinating structures and processes, and providing targeted support to

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schools as well as feedback to central government. A middle tier can also manage resistance to change and enhance collaboration between schools (OECD, 2022a), improving consistency and sustaining improvement (ibid., p. 242). A middle tier is particularly relevant to the project countries, Spain, Italy and Portugal. However, in more centralised administrations, the concept of a 'middle tier' can still strengthen collaboration and communication, for example by developing cluster arrangements among schools/institutions.

In addition to the national/regional cross sector co-operation discussed above, other considerations include:

- a fair system of funding and resource allocation to enable capacity building – for example, professional learning, leadership development, resources for schools (for more information see Annex 2 and European Agency FPIES project);
- communication/information flows across and between system levels to ensure that information is used for policy review and improvement in other areas such as professional learning, resource management, school organisation (curriculum, assessment and pedagogy) to improve coherence and consistency across regions and communities;
- structures/mechanisms to enable stakeholder dialogue and feedback at national, regional and local levels (e.g. in agreeing priorities and associated indicators).

… at school level

It is clear, then, that M and E activities require a focus on the school and classroom level, as this is where inclusion is ultimately successfully implemented (Carrington et al., 2017; Schuelka, 2018). To enhance the **quality of education for all learners**, schools need support to build capacity and capability with a model of M and E that supports continuous improvement. As shown in Figure 1, systems can be put in place such as:

- school self-review of key areas of policy and practice;
- external review or more formal inspection;
- staff appraisal;
- learner assessment.

School self-review

There are a range of tools available for monitoring and evaluating school structures and processes. Some of these are included in Annex 1 of this report. These tools focus on a number of key areas which all contribute to learners' well-being, participation and achievement. For example:

- Leadership (developing inclusive values, culture and learning environments).
- Collaboration and connections with parents and the local community – listening to learners, families, wider stakeholders.
- Pedagogy for all learners (on-going professional learning).

- Curriculum and assessment for all learners.
- Support for learning.
- Staff appraisal and professional learning.

Additionally, information on use of finance and resources (including cost-effectiveness of different strategies and approaches to support learners with diverse needs) and of course, learner attainment/achievement data will be important in planning improvement.

Generally, schools will undertake self-evaluation activity on an annual basis, although they may choose to focus on particular priority areas, rather than a full review. Important here is a common understanding of the use of evidence for improvement, linked to clear school-level action plans.

Research indicates that school self-evaluation can positively affect school improvement (McNamara, Skerritt, O'Hara, O'Brien & Brown, 2021; Schildkamp, Vanhoof, van Petegem & Visscher, 2012) and improve outcomes for learners (Caputo & Rastelli, 2014; Antoniou, Myburgh-Louw & Gronn, 2016). The many potential benefits include developing shared understandings of key ideas and a sense of ownership and self-determination in those taking part. Stakeholder involvement in school self-evaluation is essential. In particular, it is vital to ensure that all groups are represented and all voices heard, including those of disadvantaged groups.

Collecting stakeholder views and in particular the experience of learners should not be an 'add on' but an integral part of the teaching, learning and assessment process. In order to align with inclusive values, all decision-makers should appreciate the value of such data in reviewing the impact (positive and negative) of structures and processes on every learner in the school system.

Maxwell and Staring (2018) synthesise the actions that EU member states have taken to achieve a balance between strengthening school self-evaluation and continuing to empower schools. These include:

- developing a national set of quality indicators for schools to select from as they undertake their own self-evaluation, preferably the same indicators which will be used by external reviewers or inspectors;
- encouraging peer review activity whereby schools join in self-evaluation activity with other schools or undertake collaborative review and improvement activity in pairs or groups;
- providing schools with relevant benchmark data derived from national collections of attainment and other data, which enable the school to see how their own development and outcomes compare to other schools, including more specific benchmarking against other schools serving learners in similar socio-economic circumstances (Ibid., p. 10).

Maxwell and Staring (2018) also suggest that practitioners should be trained in the use of self-evaluation tools including how to collect and analyse the information gathered to inform improvement. Many examples of self-evaluation tools are included in the Annex to this report and also in project Deliverable 4.2.

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External evaluation

To ensure that school self-evaluation (SSE) provides an accurate picture of a school, it has become common practice to combine school self-evaluation with other sources of evidence, such as external inspection and learner attainment and achievement results. The European Commission (2017) suggests that:

> Systems that support the synergy of external and internal quality assurance have more built-in resilience to cope with the complex process of change (p. 50).

Greany (2015) noted that the inspection system can clarify expectations and incentivise self-evaluation by schools. However, the disadvantages of a high-stakes accountability regime are well known: such practices can reduce freedom and autonomy to innovate (Dunford, Hill, Parish & Sandals, 2013; European Agency, 2017b) and lead schools to teach to formal tests/examinations and 'second guess' what they think inspectors wish to see (rather than looking at evidence). The publication of school evaluations may raise the stakes further, making such practices more likely.

Inspection designed to promote improvement may be less standardised and may also build in a 'professional dialogue' to help schools learn from inspectors who may have wide experience of practice elsewhere (Maxwell & Staring, 2018, p. 13).

External evaluation may be supported by stakeholder surveys to gather a range of perspectives in harder-to-measure areas, such as psychological, physical, social and material well-being, effectively broadening the evidence on learner outcomes beyond academic areas (OECD, 2023).

Evaluation and appraisal of teachers and school leaders

It has been recognised for some time that the variability in the quality of the education that learners receive is often greater within individual schools than between different schools (OECD, 2013). This is due, at least in part, to differences in professional practice and reinforces teacher and leader performance as a necessary area for quality assurance.

Some countries have developed frameworks of design principles or standards for teachers and leaders to increase consistency of practice. Others have established independent regulatory bodies for the teaching profession to support implementation of standards (Maxwell & Staring, 2018). Data from appraisal can be used to plan appropriate professional learning to fill any 'gaps' in school provision and/or to develop approaches for particular learner groups.

Use of national qualifications and examinations

National learner assessments (usually externally set and marked) are often used with school external and self-evaluation and staff appraisal. This is an important source of data on learner learning but can have adverse effect on equity and inclusion, increasing the stakes for schools and narrowing the curriculum.

Maxwell and Staring (2018) note that the risk of high-stakes assessment can be mitigated by:

- embedding 'generic, higher-order skills' into subject assessments and certifying wider areas of learning beyond the traditional academic curriculum, with innovative assessments that capture more complex learning outcomes;
- giving importance to key competences in analysis and presentation of results;
- considering data alongside other evidence, e.g. reports from national inspection and evaluation agencies that examine difficult-to-measure aspects, such as creativity;
- involving learners, employers and the wider community in defining learning outcomes and assessment methods to ensure relevance (2018, pp. 21–22).

Teacher assessment

Many countries are 'moving away from quality assurance as a 'control' to more open and 'trust-based' approaches' (European Commission, 2017, p. 51). This includes trusting teachers to make judgements about learner progress and achievement. This is the case in Finland, where 'traditionally, teachers are trusted as professionals who know what is best for the children' (Aho, Pitkanen, Jouko & Sahlberg, 2006, p. 127). This is reinforced by Eurydice who note that in Finland, 'the education system is based on trust and responsibility'.

To develop a culture of mutual trust takes time and depends largely on the culture developed by the school leadership. All learners will benefit from a climate of openness, where all learners and staff are valued and provide support for each other in finding innovative solutions to challenges. Where data focuses on a narrow range of subjects/curriculum content, it can run 'counter to the promotion of a balanced understanding of learner development' (Maxwell & Staring, 2018, p. 24). Teacher assessment offers a way to put the learner at the centre of the assessment process and generate data for wider achievement (not just academic attainment).

Assessment of learners should be guided by a national framework that supports consistent judgements by teachers. Such a framework should also be able to record and celebrate the success of all learners in the education system, including learners with more severe disabilities and complex support needs (see Annex 3 for an example from the UK – Wales). Crucial here too is that the framework covers wider areas of achievement – not only academic attainment. While formal tests and examinations can provide a snapshot of learner attainment and standardised results across a country, alternatives need to be in place for those learners not able to access such assessments and also for those areas of the broader curriculum that cannot be easily measured (e.g. learners' social and emotional development, their motivation to go to school).

Schools need to have in place an assessment policy that reflects an understanding of the relationship between on-going **(formative) teacher assessment**, which usually feeds into planning to enhance learner progress, and **summative assessment**, which may be a summary of teacher assessment or more formal tests/examinations. Summative assessment may be shared at regional and national levels to inform monitoring and

evaluation of policy and practice. To support learner assessment at school level, policy-makers should:

> recognise and address the potentially competing functions of formative and summative assessment and develop a fit-for-purpose, integrated system of assessment (European Agency, 2017b, p. 47).

The quality and consistency of teacher assessment should be improved by moderation, both within schools and across school networks. This may involve teachers discussing learner work and comparing judgements/criteria for awarding grades which is in itself a valuable form of professional learning.

Stakeholder involvement

Key partnerships with parents, members of the community and other professionals can support inclusive practice, enhancing a culture of collaboration and enabling effective communication across horizontal and vertical relationships. Stakeholder collaboration can support a range of processes including sharing values and expectations, developing trust and motivation, taking ownership and building competences (European Commission, 2018). The Agency (2022c, p. 50) recognises the importance of a 'participatory school policy' to give learners a more active role in shaping their own learning processes. The work of Shier (2006) provides a model of participation with questions to consider to facilitate the inclusion of learner views.

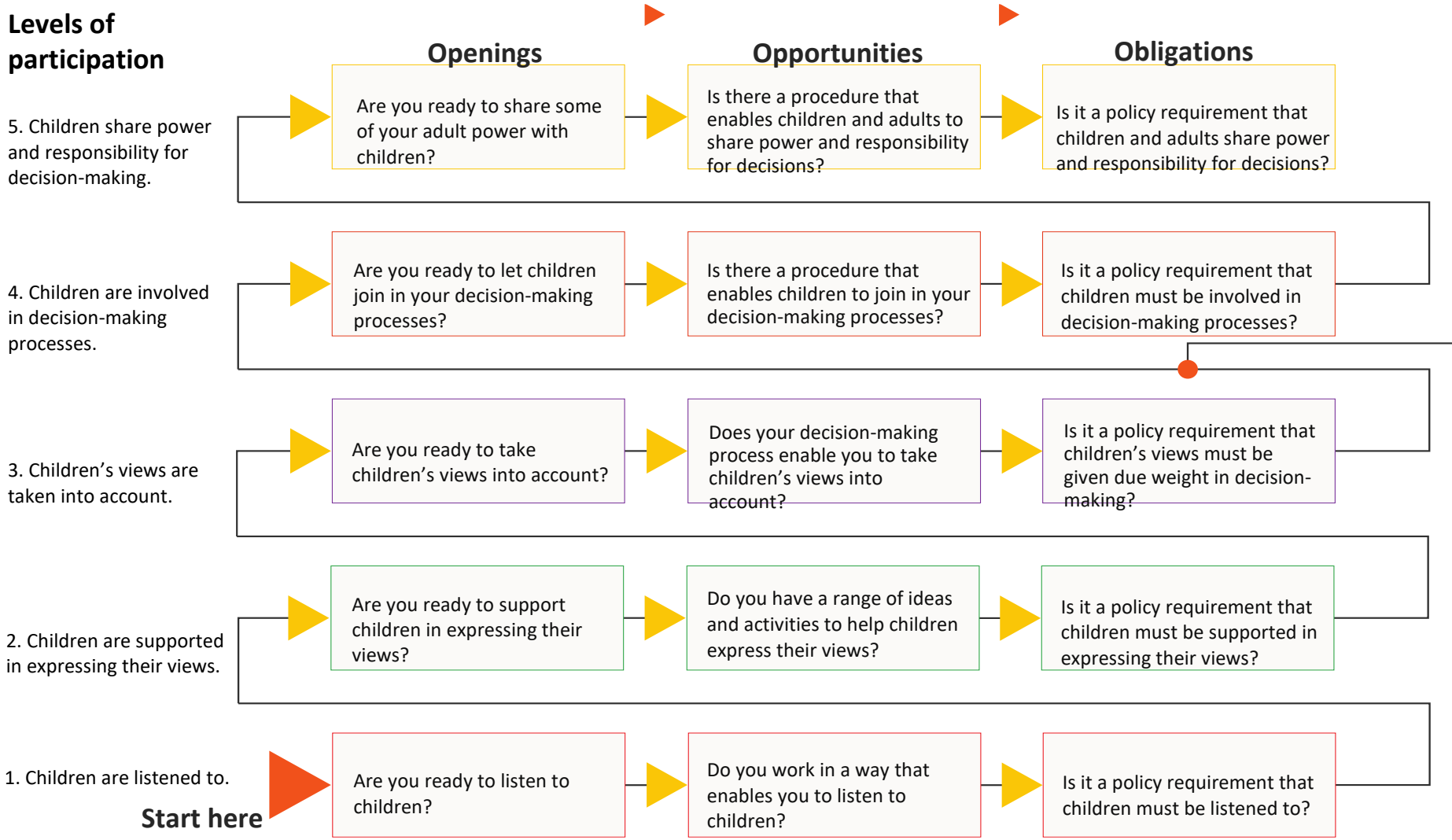

Figure 2. Shier's model of participation (Shier, 2006)

Making effective use of data/information – a holistic approach

At school, regional and national system levels, decision-makers need to consider what data/information and feedback is required and how it is analysed to examine key areas of policy and practice, and plan for improvement. As shown in the model above, all levels and elements within the system are interdependent and need to be considered together as part of a coherent M and E strategy. This strategy must be reliable, transparent and valid, and – as stated above – based on an understanding of 'balanced' learner development (Maxwell & Staring, 2018, p. 6).

There is also a need for balance between improvement and accountability. The European Commission recognises that relying on a 'limited number of high-visibility evaluations and assessments, and government or media-generated "league tables"' (2017, p. 51) may increase the stakes for schools, while OECD (2022b) points out:

> Framing data use as a continuous school improvement process, and not solely as compliance to accountability demands, contributes to aligning stakeholders' beliefs, attitudes, and perceptions about data use (p. 5).

In short, a culture of trust and shared accountability (Looney & Kudelova, 2019) is more likely to support effective collaboration and inclusive practice. However, where information points to poor performance, further analysis should be undertaken to hold key personnel to account.

A holistic approach to using data/information from learner/school level to monitor and evaluate policy and practice throughout the system is summarised in the table below (Table 1). It follows that the focus is on high-quality provision for all learners and therefore no specific reference is made to 'standalone' inclusion plans which may encourage a focus on particular groups of learners rather than prevention of barriers to participation and achievement for everyone.

Table 1. A whole system view of information collection

Data/information focus	Type	Purpose
Learner	Teacher assessment (formative)	To inform teaching/learning, adapt curriculum, pedagogy, support
	Teacher assessment (summative including standardised tests/exams etc)	To record learner progress, attainment, achievement to report to parents/carers; assess school performance and success with all learners; evaluate effectiveness of school organisation, curriculum, pedagogy, resources to inform improvement

Data/information focus	Type	Purpose
	Learner/stakeholder feedback	To listen to learners/families' views of school values/ethos, etc.; assess learners progress in hard-to-measure areas to contribute to review of policy/practice
School	School self-review	To assess effectiveness of key areas of policy and practice, e.g. leadership, school environment and organisation, curriculum, assessment, pedagogy; finance and use of resources; staff performance and professional learning; collaboration with other professionals/agencies; connections with stakeholders; learner attendance (participation and engagement); learner achievement. This will include both review of development plans and practical implementation
	External review	To verify school's own review with external peers, advisors, inspectors and set priorities for improvement
	Staff appraisal	To assess effectiveness of staff, plan professional learning opportunities to ensure school's capacity to meet diverse learner needs
	Stakeholder feedback	To gather views of learners, families, stakeholders in local community to verify school self-review and raise issues/concerns to be addressed on an annual basis
Regional/national	School attendance data	To analyse numbers of learners attending mainstream schools, separate units/classes, specialist provision, alternative settings, etc.; learners out of school/education provision, learners dropping out/leaving early (cross-sector input) To analyse attendance of learners by gender, ethnic/linguistic background, disability, socio-economic background, geographical location for national monitoring of diversity, equity and inclusion (disaggregated data) (Links to UNCRPD, SDG4 monitoring, OECD and EU indicators)

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Data/information focus	Type	Purpose
	Learner outcome data (summative/ standardised assessment /moderated teacher assessment)	To analyse data to highlight gaps in educational opportunities and outcomes/learner destinations as a basis for development and monitoring of evidence-based policies or barriers for particular groups To examine data on learners receiving different levels of resources/support (moderated) to evaluate what works (Links to PISA, TIMMS, PIRLS, etc.)
	School summary information from self/external review, staff appraisal, financial management	To examine effectiveness/efficiency of school organisation, curriculum, assessment, pedagogy, staff professional learning, support for learners, use of finance/resources, multi-agency collaboration in review/evaluation of national policies
	Stakeholder feedback	To monitor (e.g. by annual survey) views on vision, values for education system, curriculum, support issues, etc. To share information from different regions to increase consistency (Links to data from TALIS)

The table is not exhaustive but serves to illustrate the importance of learner data as the basis for M and E and the need for correspondence and feedback between system levels.

In the UK (Wales), a framework for evaluation, improvement and accountability aims to deliver sustainable school development and the implementation of new curriculum and assessment arrangements. The guidance supports school self-evaluation and improvement planning and aims to bring clarity to roles and responsibilities of all stakeholders across system levels to raise attainment and wider achievement. The guidance can be found at: Framework for evaluation, improvement and accountability

Further examples of cross-level working can be found in Annex 3

There is clearly scope to develop data use for other areas of policy/practice and to examine issues in greater depth, according to country priorities, the context and the data/information that is available, and the timescales which are considered realistic and manageable. Some examples are as follows:

- Using learner achievement data alongside placement data to examine the effectiveness of inclusive settings compared to special or segregated settings. An example here is the Agency's EASIE data presented in Annex 3 of this report, which is collected every two years.

- Using data on learner achievement and outcomes (usually annual) to assess the effectiveness of support provided to different learners, including the impact of multi-agency inputs, curriculum and pedagogy at school level, but potentially extending to regional/national levels.
- Using learner outcome data to assess the impact of staff professional learning opportunities and the extent to which the full range of learners' diverse needs are met by schools, or there are gaps in provision that need to be filled.
- Using evidence of the impact of interventions for different learner groups, with related costs as a basis for guidance on efficiency and effectiveness. An example of such practice from the Education Endowment Foundation in the UK (England) is presented in Annex 3.
- Using data on different learner characteristics (e.g. immigrant background, socio-economic status) to map segregation in schools and consider school admission criteria or incentives for schools to increase the diversity of their population, making them more representative of their local community (Mezzanotte & Calvel, 2023).
- Using data on enrolment/presence of different learners to design funding mechanisms based on, for example, a flat grant, weighted learner formula or information on total population per region /municipality (Ibid.). Further information on financing inclusive education systems is presented in Annex 2.

As stated in the table above, there is also a requirement for more specific analysis of learner data to monitor equity and inclusion. UNESCO (2020) suggests that data is used for the following purposes:

- to highlight gaps in education opportunities and outcomes among learner groups, identifying those at risk of being left behind and the barriers to inclusion;
- to use data on learners being left behind to develop evidence-based policies and monitor their implementation (p. 65).

M and E for equity and inclusion

To assess the inclusiveness of an education system and highlight existing gaps and barriers, ensuring equitable opportunities in terms of access, academic and wider learning and achievements, it may be necessary to disaggregate data by learner group. This will require a careful consideration of the characteristics that are likely to:

> make children and young people more vulnerable and, therefore, more likely to undermine impartiality and ultimately their inclusion in education (UNESCO-UIS, 2018).

While these characteristics will vary by context, international frameworks focusing on equity generally examine learners' gender, immigrant status and socio-economic background (Mezzanotte & Calvel, 2023, p. 52) Other dimensions, e.g. disability, ethnicity, LGBTQI+, are less commonly reported.

OECD (2021) focused on equity as meaning that:

> access, participation and progression to obtain a quality education are available to all and that personal or social circumstances – such as gender, socio-economical or immigrant background – are not obstacles to achieving educational potential (p. 16).

The development and use of indicators is the subject of the next section, but they play a key role in monitoring equity and inclusion. OECD (Ibid.) suggests that several indicators should be used to analyse participation and progression through education, together with outcomes across a number of equity dimensions: for example, gender, immigrant background or country of origin, and sub-national regions. Other researchers have added equity indicators for socio-economic status, sexual orientation or ethnicity (European Group for Research on Equity in Educational Systems, 2005; Baye, Demeuse, Monseur & Goffin, 2006; UNESCO, 2017; OECD, 2018).

When considering learner characteristics however, it is important to take into account the potential risks of labelling, which can lead to stigmatisation or low expectations. The primary aim of using labels should be to understand reasons for exclusion or marginalisation and to better target policy (Ahmed, 2012; Simon & Piché, 2012; Florian & Spratt, 2013). While labels can help learners understand why they face barriers to participation and encounter difficulties at school (Brussino, 2020; Mezzanotte, 2020) and can inform discussions about the provision of specific resources (Mezzanotte & Calvel, 2023), they should be used with caution. However, labels can be used for data collection at an administrative level without being used in the classroom, as is the case in Finland where such labels are not used in schools (Brussino, 2020).

In short, education systems should take account of the positive and negative aspects of labelling and decide on the value of disaggregating data for certain groups (Mezzanotte & Calvel, 2023). Decision-makers should also be aware of increasing diversity and intersectionality which make the use of labels problematic for learners whose characteristics overlap. Policy targeting single categories of learners may fail to consider the interaction of different identities which can form unique meanings and complex experiences within and between groups in society (Palència et al., 2014). Policy-makers could consider, when designing data collections for the development of such indicators, which intersections may be particularly challenging for learners to achieve at their best and plan for relevant information to be collected.

A further important area is the monitoring of learner rights both to and in education. While most countries can provide data on learners attending early childhood education and compulsory education, few have a record of learners who are out of any form of education (UNESCO, 2020; UNESCO, 2021). Important too is the need to take account of learners who are not fully included and participating in mainstream education, as well as those whose right to education is not being fulfilled (European Commission/EACEA/Eurydice, 2020). Here, countries should have information gathered for monitoring commitments relating to the 2006 UN Convention on the Rights of Persons with Disabilities and Sustainable Development Goal 4. More information is included in Annex 4.

The development and use of indicators

The process of developing standards supported by indicators is crucial to meaningful M and E within a well-designed framework that ensures conceptual clarity and coherence with wider education policies (European Commission, 2020). Such a framework should not only provide a rationale for the selection of indicators but also an understanding of links between them (OECD, 2023).

As stated earlier, an effective M and E system cannot be imposed and requires stakeholder involvement and a system-wide culture of evaluative thinking and improvement. This can best be achieved through a collaborative approach to the development of the indicators needed to monitor progress towards the goals set out in the national strategic plan and related school improvement plans.

These plans should set clear goals and potential indicators before data-collection activities take place to ensure that indicators really do measure what matters (Schildkamp, 2019). Adams et al. (2017) note that school effectiveness and an education system's health cannot be evaluated 'from a single summative outcome indicator' (p. viii) and a range of indicators will be needed.

What are indicators?

OECD (2023) notes that definitions of what exactly an indicator is can vary. Some researchers consider an indicator to be a quantitative measurement, such as a statistical indicator. Others suggest that indicators can be qualitative in nature and reflect reasons, views and attitudes (European Commission, 2019; European Commission, 2001).

According to the OECD, the use of indicators has recently increased as they enable educational planners and decision-makers to:

- monitor changes in different areas, such as learner performance, alerting policy makers to impending problems;
- measure the impact of educational reform efforts;
- account for specific needs in funding schemes or formulae;
- encourage an education system to improve by comparing it, or parts of it, to systems in other jurisdictions;
- focus attention on educational subsystems that may require improvement, such as particular localities or levels of education;
- support teachers' development and self-evaluations;
- feed into schools' self-evaluations (Mezzanotte & Calvel, 2023, p. 48).

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The development process

Before adapting or developing indicators to support their vision and goals (expressed as standards), decision-makers should be clear about the following core principles:

- Indicators need to be **adaptable** to take account of different contexts, cultures and histories (European Agency for Development in Special Needs Education, 2011; Sharma et al., 2018; UNESCO, 2020).
- A **complete** set of indicators is needed to support, together with research, an understanding of the complex relationships between different elements. A series of indicators should assess all relevant components to inform an understanding of the health of the whole system and conditions where goals are not met.
- Indicators must be **clear** and should be widely communicated and understood by all stakeholders.
- Indicators should be **collaborative.** Different stakeholders should be consulted on the development of indicators, including country representatives, experts and practitioners. This can strengthen legitimacy and relevance to policy, and enhance their use, implementation and further data collection (Mezzanotte & Calvel, 2023 p. 19).

The development of indicators and related practices is complex as it requires 'the right balance between guiding development and strengthening accountability' (OECD, 2022b, p. 1). Mezzanotte & Calvel (2023) note that indicators should be adapted to the culture, characteristics and needs of each system and stress it is fundamental to choose carefully what to measure, and for stakeholders to develop an understanding of why that dimension of progress is important for the development of inclusive education. This step is relevant as different parties may interpret the relevance of certain dimensions differently, given their different goals and interests.

Sharma et al. (2016) set out a six-phase process for developing and implementing indicators. Their work in the Pacific region focused specifically on disability but includes information that is relevant to this project.

The development steps are:

- Set up a national development team to oversee implementation. The team should reflect the main areas of the education system, e.g. all sectors and phases plus representatives from special and inclusive education, assessment teams, data management units, as well as non-government education providers. There should be a common understanding of the role of the team and a firm commitment to consultation with stakeholders, using clear and agreed terminology.
- Select appropriate indicators, focusing on country priorities, vision and goals for inclusive education. A small, manageable number of core indicators should be selected with potential to add additional areas at a later stage. In selecting indicators, group members should be familiar with data already collected centrally and at school level and link to data collected for other purposes (e.g. monitoring UNCRPD/SDG 4). There should be a balance between information for routine monitoring and data that requires periodic collection for evaluation.

- Evaluate which data collections are sustainable in terms of cost-effectiveness. Mezzanotte and Calvel (2023) suggest that systems should aim to select a pool of indicators that balance the cost of data collection and the usefulness of the measures.
- Develop a plan to review whether current systems are sufficient and fit for purpose in collecting high-quality data/information and to ensure a coherent approach with no overlaps (unless specifically planned).
- Draw up a framework of standards and indicators which should include key definitions of terms which underpin developments, a list of relevant laws and policies, and reporting requirements. The development team should assess how to make best use of existing information and what further information is needed. Targets for indicators should be set, with a timescale for M and E.
- Decide on the means of verification, responding to the questions:
    - How do we know if we are collecting the right information?
    - Who is responsible for collecting and how often?
    - How will data be analysed, interpreted and reported?

  Some meetings and visits may help initially to check the quality of data and the evidence base to see if it appears to be dependable across regions and schools. Given that an 'ideal' indicator is not always available, the group may need to consider the best possible proxy. Here, it is important to think about the size of the gap between the conceptual ideal and the best available indicator and to consider using additional indicators to strengthen the information available if there is a significant gap (Trewin & Hall, 2010).
- Develop standard reporting frameworks and templates. Data to be used to report progress nationally will require validation to ensure a consistent interpretation of the indicators at all levels. Training of ministry leaders and other ministry personnel, school leaders and others in key roles such as teacher trainers, NGOs, etc., is particularly important to support a common understanding among all education stakeholders (Sharma et al., 2016, pp. 14–18).

When implementing indicators, additional resources will be needed to support the collection, analysis and management of data and to fulfil reporting requirements. It is also important to develop structures and processes for managing data and reporting, and a plan will be needed detailing roles, responsibilities and timescales for collecting data at different system levels. A review process should also be built-in to gather feedback and refine the process in the light of experience, engaging key personnel and stakeholders, ensuring that contextual factors are taken into account and that information is accessible to all. These aspects are included in the outline action plan for each country (Deliverable 4.2), each of which was co-developed by the Agency with each country and tailored to its needs.

The M and E process involves a critical examination of existing practices, beliefs and values in the community (Sharma et al., 2016). To manage differing points of view, the development team will need to encourage discussion and reflection to refine developments so that they are seen as relevant by as many stakeholders as possible. In a

positive and reflective culture, data use can become part of the day-to-day work of stakeholders at all system levels (OECD, 2019).

In summary, an indicator system will set out how individual indicators contribute to measuring overall performance. This in turn requires a framework that sets out the links between various elements (UNESCO-IIEP, 2021). The model in Figure 1 can be a starting point for countries to review their system and ensure that appropriate links exist.

SUMMARY

Monitoring and evaluation of inclusive education is complex and cannot be reduced to a checklist. It requires a holistic model, drawing on a number of data sources – quantitative and qualitative – with analysis and interpretation that involves a range of stakeholders. It also requires strong leadership across the education system with links between school, regional and national levels to ensure that data/information is used effectively. This will involve holding stakeholders to account but doing so in a climate of shared responsibility to support the aim of improving the education experience and achievement of all learners.

The World Bank (2018) captures a crucial issue saying, 'Any country can do better if it acts as though learning really matters' (p. 3) but notes that many features of education systems conspire against learning, in particular a lack of coherence which makes 'borrowing' system elements from other countries a risk. They recommend that countries can improve by making learning and assessment a serious goal, acting on evidence to make schools work for all learners and by aligning actors across the whole system to tackle technical and political barriers to change (Ibid. p. 24). An example of one country's approach to monitoring inclusive education is included below. This makes clear that, while materials from other countries are used as a resource, it is necessary for key stakeholders to engage with the development process to ensure that structures and processes are appropriate for the country context. Further country-specific proposals and examples of practice are presented in the individualised outline action plans (Deliverable 4.2). However, in summary, countries need to take the following actions:

- Hold discussions with stakeholders to ensure **conceptual clarity** about inclusive education and establish a common vision of high-quality equitable education. All stakeholders should broadly agree on the outcomes they would like to see from the education system.
- Leaders and key stakeholders should undertake a **critical analysis** of the current context. Those who may be considered as 'key stakeholders' may vary in different countries, according to organisational structures and other factors. There are no 'quick fixes' and while 'the lack of a comprehensive list of internationally relevant indicators for inclusive education that is suitable for all contexts' may be disappointing, the 'complexity found at the local level with respect to cultural, social, religious and other contextual differences' must be taken into account (Loreman, Forlin & Sharma, 2014b, p. 182).
- Develop a **coherent assessment framework** that can be used flexibly to record and celebrate the success of all learners and ensure progression routes. This will (with professional development) support consistent assessment by teachers across schools/regions and contribute to reducing disparities.
- Establish **connections** between system levels. For example this may be overseen by a high-level ministerial cross-sector group with links to groups/key personnel (a co-ordinating middle tier) at regional/local levels.
- Build **capacity and competences** for the inclusive practice of stakeholders – in particular teachers and leaders. This will require finance and resources for staff

appointments and professional learning, along with collaboration to build the capability of staff to use resources creatively and develop innovative inclusive practice in schools and classrooms.

- Develop mechanisms and strategies to support **collaboration** between stakeholders at all levels of the system.
- Open channels of **communication** to enable all stakeholders to keep up to date with developments and contribute to consultation. This can be online or face to face, but should in particular listen to the voices of learners and families who are vulnerable to exclusion or marginalisation and have traditionally been 'hard to reach'.
- Finally, a **culture of improvement** must underpin all development – requiring strong leadership, trust among stakeholders and a climate of mutual support.

Example of a country-monitoring system focused on inclusive education

A team of the Institute of Psychology for the Social Inclusion and Poverty Reduction Unit and UNICEF, supported by the Republic of Serbia's Ministry of Education, Science and Technological Development and the Fund for an Open Society Serbia, worked to develop a methodological framework for monitoring the quality of inclusive education, to provide an insight into inclusive education and propose mechanisms for its improvement.

The framework has been developed at three levels – national, municipal and school – and includes exemplar instruments for developing indicators. The development follows a review of inclusive education in Serbia and current resources created for the monitoring and improvement of inclusive education.

The development of the inclusive education system is supported by new legislation, the establishment of new structures at the national, local and school level, training of teachers, additional financial resources for school development, establishment of support networks, and guidance manuals and public promotion activities. Despite these developments, monitoring and assessment of the effectiveness of these solutions has remained at a basic level due to, for example, a poorly developed education information system and an insufficiently developed system for external school evaluation.

The Framework distinguishes between input, process and output indicators. The reasoning behind this is highly relevant: the effects of inclusive education (output indicators) result from a successfully delivered education process (process indicators), which, in turn, can only be the consequence of the effect of input variables/indicators. Therefore, in the first few years, it makes the most sense to focus monitoring efforts on input indicators, i.e. to determine whether all envisaged measures have consistently reached the beneficiaries (schools, teachers, learners, parents) and then later to switch the focus to process indicators, to verify whether the measures are adequately implemented. Subsequently, it would make sense to focus on monitoring output indicators.

This work was inspired by a comparative analysis of quality assurance systems and external evaluation of education in Australia, the Netherlands, New Zealand, Scotland and Wales, as well as:

a. research on inclusive education in Serbia;

b. the measures derived from the legislative framework for inclusive education in Serbia;

c. consultations with members of the Inclusive Education Support Network and other experts in this field.

The outcomes of this analysis are shown in Table 2.

Table 2. Comparative analysis of quality assurance systems

Level	Input indicators	Process indicators	Output/outcome indicators
National	National legal acts pertinent to inclusive education (Scotland) Standards for Initial Teacher Education – Value and demonstrate a commitment to social justice, inclusion and protecting and caring for children (Scotland)	No indicators describing this category were identified.	Annual Education Report (the Netherlands) Quantitative indicators (the Netherlands) National assessment of learners' performance (Australia) Performance data for each school (Wales) National reports (Wales)
Regional	No indicators describing this category were identified	Decision on type of Differentiated school review (negotiated review, continuous improvement, diagnostic review, extended diagnostic review) (Australia)	School review reports presented to all stakeholders (Australia)
Local self-government	No indicators describing this category were identified	Use of other services (Scotland)	Range of data relating to educational support and achievement analysed by local authority to make comparisons (Wales)

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Level	Input indicators	Process indicators	Output/outcome indicators
School	School strategic plan (Australia) Annual implementation plan (Australia) Self-evaluation report (Wales) Statutory regulations (the Netherlands) Learning environment (Wales) System for monitoring the progress (the Netherlands) Accessibility and participation of children and parents in school and community life (Scotland)	The school climate (the Netherlands) Guidance (the Netherlands) Extra care (the Netherlands) Care, support and guidance (Wales) Well-being (Wales, Scotland) Holistic approach to learners' needs (Scotland) Learning experiences (Wales) The curriculum prepares learners (the Netherlands) Leadership (Wales) Improving quality (Wales) Monitoring implementation of key improvement strategies and progress towards one-year targets and achievement milestones (Australia) Quality assurance system (the Netherlands) Partnership working (Wales) Resource management (Wales)	Meeting standards (Wales) All learners' achievements and advancements (Scotland) Perception of safety (the Netherlands) Care, support and guidance (Wales) Self-evaluation report endorsed (Australia) Annual Report endorsed (Australia)

Based on all these four sources, a matrix of areas and sub-areas for monitoring was created at each of the three levels described above and for each of the three types of indicators, and then indicators were formulated or classified for each cell in the matrix. This contributed to the comprehensive coverage of the Framework, which enables multi-layer monitoring, with the capability to simplify and focus the monitoring system, in the later years, on the aspects that prove to be especially critical or sensitive, or particularly successful.

The Framework enables the production of information for annual or multi-annual national-level reporting on inclusive education, based on:

a. selected input, process and output indicators;

b. municipal-level reporting on inclusive education;

c. complementing the framework for external school evaluation with new indicators;

d. supporting the development of school self-evaluation;

e. for various research purposes and meta-analysis of a larger number of studies.

It is important to underline that the use of the same framework by different stakeholders and for diverse purposes has another important function: to ensure conceptual coherence through a common language for all levels and across various education system stakeholders. A common language is necessary for communication and constructive discussion, which is critical to future development.

Also crucial is the fact that the framework enables the monitoring of national education policy impacts at the municipal and school levels. This approach recognises that education policy set at the national level becomes functional only when lower levels adapt themselves, rearrange their activities and organise to achieve the objectives set at the national level.

If a new national policy is not fully developed, is incomplete, contains inconsistencies or omits important elements (above all, a well-established institutional, legal and financial framework), or lacks follow up actions to ensure that it reaches lower system levels, it cannot be implemented adequately at either municipal or school level and it will not achieve expected results.

This multi-layer approach also has the potential to set out clear reporting cycles and roles at different management levels regarding data collection. The logic of data collection requires that data should be collected at school, class and individual level; however, the data can only be considered useful when it is appropriately aggregated at school level and forwarded to higher management levels for further analysis. If the data source at school level fails to provide all required data, if the data is unreliable, or if the initial data aggregation at school level is not accurate enough, then the municipal and national levels will lack valid data and will not be able to monitor the development of education or adjust, adapt or improve relevant policies. Importantly, it will not identify disparities among school authorities, municipalities and schools in terms of inclusion success.

The framework, including indicators, can be found in full at: Monitoring framework for inclusive education in Serbia (pdf)

ANNEXES: EXAMPLES AND MATERIALS

The materials presented in Annexes 1 and 2 are not intended to be prescriptive, but to provide a basis from which school and national-level indicators can be developed following discussion and research to ensure that work is relevant to the country/local context.

Country examples are also presented (Annex 3) to exemplify different aspects of work to support the M and E model for continuous improvement.

Annex 4 provides brief information on some sources that should be taken into account if countries contribute data/information, e.g. UN monitoring.

Annex 1. Materials/indicators for school self-review

European Agency Raising Achievement Self-Review

Developed as part of the European Agency Raising Achievement project, the self-review was designed to assess some of the harder to measure areas identified as playing a key role in inclusive practice and raising learner achievement. The dimensions covered are:

1. Pedagogy for all learners
2. Support for Learning
3. Leadership roles and approaches
4. Learner well-being and participation
5. Curriculum development
6. Partnerships and collaborative working
7. Support systems for staff and leaders

These dimensions can be rated using a 5-point scale. The resource, designed to be used collaboratively, can also be adapted to different school contexts. The materials can be found at Raising the Achievement of All Learners: A Resource to Support Self-Review

Other resources

For early years settings, the Agency has developed an Inclusive Early Childhood Education Environment Self-Reflection tool. A self-reflection tool helps to stimulate professional dialogue on school leadership and collaborative policy development.

UNESCO – A Guide for ensuring inclusion and equity in education includes a review framework and action plan guidelines.

UK (Scotland) – How Good is our School

Education Scotland have produced a suite of quality indicators that support school self-evaluation as a starting point for school improvement.

UK (England) – **EEF teaching and learning toolkit**

This toolkit provides an accessible summary of evidence on 30 approaches to support teachers and school leaders to make decisions about how to improve learning outcomes. The materials help leaders/teachers to consider evidence and use their professional judgement to consider security, cost and impact of different approaches. The school leader reflection tool may help leaders to explore what might work best in their own school context, in line with their priorities.

Annex 2. National-level materials/indicators

Mezzanotte and Calvel (2023) – examples of input, process and outcome indicators

Based on the input-process-outcome model, Mezzanotte and Calvel provide a structure and suggest areas for analysis. They stress that that different users will adapt the categories to their specific understanding, context and needs.

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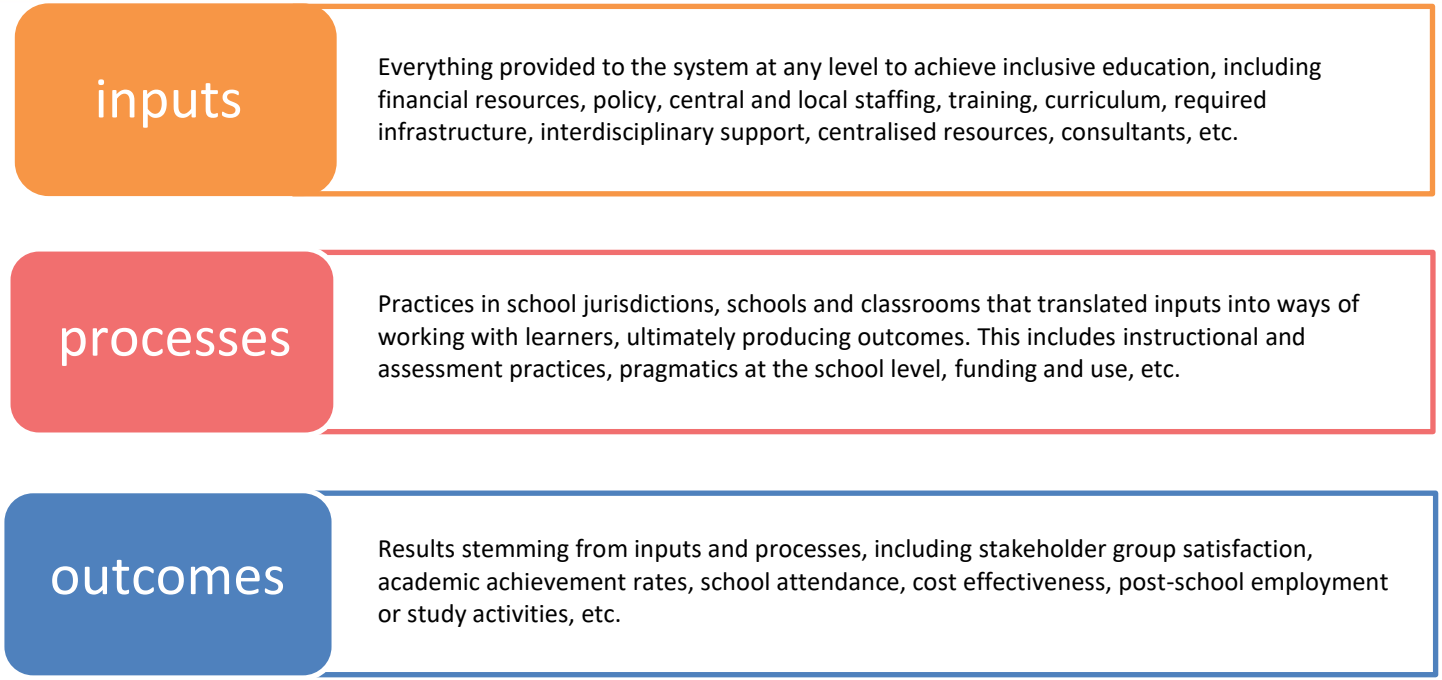

Figure 3. The input-process-outcome model in inclusive education

Source: Adapted from Loreman, Forlin, Chambers, Sharma & Deppeler (2014a), based on Kyriazopoulou and Weber (2009).

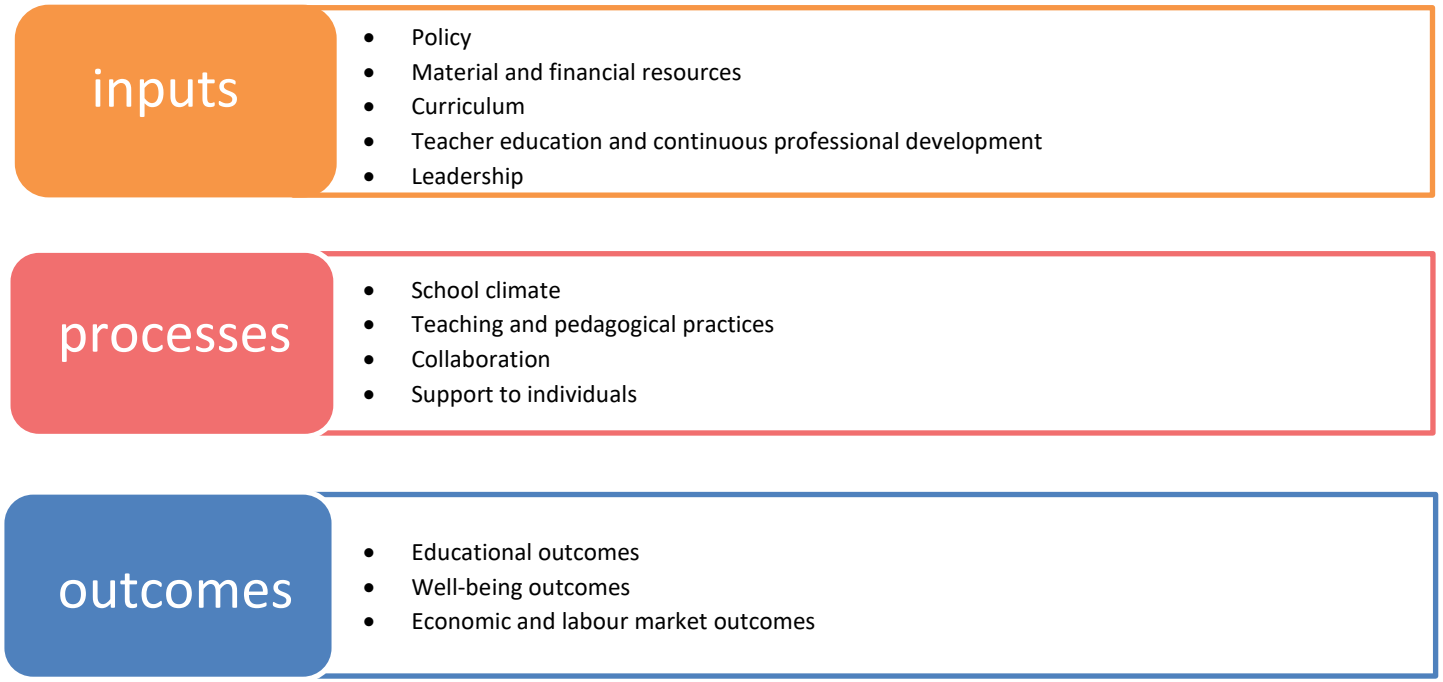

Figure 4. An input-process-outcome model for indicators of inclusion in education

Source: Mezzanotte and Calvel's elaboration of work by Loreman et al. (2014a), complemented by the work of Cerna et al. (2021).

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Table 3. Areas and indicators to measure inputs

Exemplifying potential indicators of inputs in inclusive education.

Area	Example indicator 1	Example indicator 2	Example indicator 3	Example indicator 4
Policy	Existence of a school-level policy for inclusive education	Is information about the school made accessible to all, irrespective of home language or impairment (e.g. in Braille, in languages different from the instruction one, etc.)?		
Material and financial resources	Distribution of funding between more and less advantaged schools/learner groups	Percentage of education budget spent on implementation of disability-inclusive education plan at the local level	Provision of targeted resources (e.g. school meals, books, transportation) to vulnerable learner groups	
Curriculum	Does the programme reflect the varied backgrounds of the learners?	Which groups (e.g. learners with SEN, Indigenous learners, etc.) receive special provisions within the curriculum?		
Teacher education and CPL	Availability and quality of initial education and continuous professional learning received by teachers in the field of inclusive education	Alignment between staff professional development activities and learners' diverse needs	Teachers' self-reported efficacy in teaching learners with SEN, teaching in a multicultural or multilingual setting, communicating with people from different cultures or countries, and approaches to individualised learning	Monitoring the feelings of self-efficacy with respect to inclusive teaching methods. Teachers' beliefs and questions on their ability to teach in a multicultural setting

Area	Example indicator 1	Example indicator 2	Example indicator 3	Example indicator 4
Leadership	Leaders' knowledge on inclusive education	Values/beliefs of leaders on the inclusion of diverse learners		

Table 4. Areas and indicators to measure processes

Exemplifying potential indicators of processes in inclusive education.

Area	Example indicator 1	Example indicator 2	Example indicator 3	Example indicator 4
School climate	A whole school anti-bullying policy is implemented in your school	Input from ethnically or culturally diverse learners on bullying prevention and anti-prejudice materials activities and goals are included in your school	Active involvement of different school actors (e.g. school leaders, teachers, parents, learners, etc.) in the creation of an inclusive school climate	Learners feel 'unsafe' in school because of personal characteristics, such as sexual orientation, gender expression, or race/ethnicity
Teaching and pedagogical practices	Percentage of lower secondary principals reporting that in their schools they are teaching learners to be inclusive of different socio-economic backgrounds, provide them additional support and implement explicit policies against gender or socio-economic discrimination	Is co-operative learning used in the classroom? Is peer tutoring implemented? Are learners with diverse needs actively engaged in classroom instructional, social, and assessment activities with the rest of their class?	Individualised learning supports as an alternative to grade repetition is available in your school Is there continuous co-operation and communication between teachers and parents and if all members of the school community are kept informed about school practices?	Alternatives to suspension/expulsion are provided in your school

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Area	Example indicator 1	Example indicator 2	Example indicator 3	Example indicator 4
Collaboration	Index of learner co-operation, based on: 'Learners seem to value co-operation'; 'It seems that learners are co-operating with each other'; 'Learners seem to share the feeling that co-operating with each other is important'; 'Learners feel that they are encouraged to co-operate with others'	Is support for vulnerable learners viewed as the responsibility of all the school staff and whether special teachers or teaching assistants have opportunities to consult with other staff about strategies to help them work with all learners in their classroom? Do teaching assistants have opportunities to consult with other staff about strategies to help them work with all learners in their classroom?		
Support to individuals	There is availability and effective use of assistive technologies for learners who need them	Teachers know how to use assistive technology for individual learners who need it, including communication systems and software	Opportunities for enrichment and to stretch learning are provided for learners of all abilities	Teachers plan and present information in multiple ways, taking cultural, socio-economic status, and other types of diversity into account; Provide learners with opportunities to demonstrate knowledge and skills in a variety of ways

Table 5. Areas and indicators to measure education outcomes

Exemplifying potential indicators of educational outcomes in inclusive education.

Area	Example indicator 1	Example indicator 2	Example indicator 3	Example indicator 4
Participation in ECEC	Participation rates for learners from a lower socio-economic background	Preschool enrolment and preschool attendance for Indigenous children (or other diverse groups)		
Active participation	Percentage of learners with an official decision of SEN in inclusive settings, based on the enrolled school population	Parents are encouraged to participate in decision-making and advocacy activities in the district	Everybody is made to feel welcome	Concentration* of learners from diverse groups (e.g. low socio-economic status, minorities, Roma, etc.)
Drop-out and repetition rates	Drop-out rates from school for different groups of learners (e.g. gender, Roma)	Repetition rates for different groups of learners		
Achievement	Graduation rates for different groups of learners (e.g. by gender, immigrant background)	University enrolment and completion rates for different groups of learners (e.g. by gender, immigrant background)	Truancy rates for different groups of learners (e.g. by gender, immigrant background)	

*Note: concentration can be considered a measure of active participation as an excessive concentration of similar learners can be a barrier in them engaging with learners from a different background and hinder their ability to develop skills to actively and effectively participate in societies and relate to a diversity of individuals.

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National/regional indicators (based on European Agency Key Principles, 2021)

Table 6. Areas and indicators to measure well-being outcomes

Area	Standard	Sample indicators	Sources of verification	Possible actions
National/regional indicators	System vision and goals are agreed with stakeholders and set out a clear concept of high-quality inclusive education to provide strategic direction	Inclusion and equity are clearly defined and understood by all stakeholders Inclusion and equity are recognised as operational principles, not isolated policy goals, and are embedded in all education policies and plans Structures and processes are in place to support the participation of all stakeholders in consultation and decision-making, including learners and families	Laws/policies/guidance define key terms Policies and plans include actions to ensure inclusion, equity and non-discrimination Policies and plans include references to all learners, including those vulnerable to exclusion	Stakeholder discussion regarding key terms (using the Agency glossary as a resource) National conversation online/regional meetings to secure agreement on vision/goals for the education system Review of national-level policies with stakeholder groups to ensure all learners are included
Links to school-level information			Information from schools: leaders consult with stakeholders on vision/goals for IE, school climate/ethos reflects values	School-level meetings with learners, parents, community members, professionals and school staff

Area	Standard	Sample indicators	Sources of verification	Possible actions
National/regional indicators	A single legislative and policy framework is in place, aligned with key international and European-level conventions and communications (e.g. UNCRC 1989, UNCRPD 2006) as the basis for rights-based practice	Education law/policy is applicable to all learners, putting learners' rights at the centre Education law/policy are consistent with UNCRC, UNCRPD and other conventions protecting the rights of minority groups Legislation and policy support a single curriculum and assessment framework with flexibility to include all learners National/regional leaders are equipped to promote equity and inclusion and challenge discriminatory practice	Evidence of links between national law/policy and UN conventions, etc., including coherence of monitoring and data collection Documentation of curriculum and assessment framework – feedback from stakeholders Documentation of system for identifying learners who need additional support, involving learners/families as a resource	Review of UN monitoring/links to national data collection for inclusion and equity Development of country-specific guidance on use of single curriculum/assessment frameworks (national or regional) and flexibility at local level Development of guidance on identification of learner needs, planning support (in the context of each country's legislation and policy)

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Area	Standard	Sample indicators	Sources of verification	Possible actions
Links to school-level information		School leaders develop policy with learner rights at the centre	Evidence of school leaders'/teachers' professional development and effectiveness in meeting diverse learner needs (e.g. number/type of development opportunities)	Collection of feedback from leaders/teachers on quality of professional development etc Dialogue with learners and families to hear experiences on what is working/what needs improvement regarding needs identification and provision of support

Area	Standard	Sample indicators	Sources of verification	Possible actions
National/regional indicators	A strategic plan has been developed for capacity building (professional learning, funding and resource allocation, cross-sector collaboration) at national/regional levels to support school practice	A strategic plan sets out cross-level and sector collaboration with clear resources, roles/responsibilities There is a continuum of professional learning for all teachers/leaders/other professionals of which inclusion and diversity is an integral part Flexible funding and resource allocation mechanisms exist to enable long-term collaborative planning by local networks/school communities	Regional plan to ensure allocation of specialist and support staff including re-allocation from specialist provision	Collaboration between ministry/regional leaders (as appropriate to country context) to develop strategic plan – consulting school leaders regarding autonomy

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Area	Standard	Sample indicators	Sources of verification	Possible actions
Links to school-level information			School governance plan setting out clear roles/responsibilities; staff appraisal and professional development; funding and resource allocation relevant to school's areas of responsibility Evidence of support (funding/time) to enable school leaders, teachers, others to access training/development opportunities Evidence of feedback on professional learning/effectiveness	Develop a network of school leaders to ensure mutual support/preparation for increased autonomy Agree with teacher unions/other parties a time allocation for professional development (release from teaching plus personal time)
National/regional indicators	Collaboration between ministry, regional decision-makers, service providers, schools, etc., contributes to system coherence and improvement	Formal structures and processes are in place for collaboration at ministry and regional levels and across sectors (health/social work), e.g. high-level group/regional network	Information on structures/agreements/meeting notes, etc.	High-level ministry group to coordinate policy, key personnel in regions to facilitate multi-agency teams, develop protocols for local services Local co-ordinators to link high-level group with regional/local levels ensuring consistency, etc.

Area	Standard	Sample indicators	Sources of verification	Possible actions
Links to school-level information		School-level plans include information on cross-sector co-operation	School-level plans/protocols for cross-level partnerships, co-ordination of multi-agency partners, etc., to ensure support for learners vulnerable to exclusion, adjustments/resources to overcome barriers to learning are effectively shared/implemented	School monitoring on cross-sector co-operation – meetings, stakeholder feedback, etc.

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Area	Standard	Sample indicators	Sources of verification	Possible actions
National/regional indicators	There is a comprehensive national system for monitoring and evaluation (in line with the vision for inclusive education) to support improvement and hold stakeholders to account at all system levels (national, regional, school)	M and E links to the obligation to publish information for UNCRC, UNCRPD, SDG4 and EU-level commitments The data system includes: input (e.g. policy, resources, curriculum, training, leadership), processes (e.g. school climate, pedagogy, collaboration, support) and outcomes (e.g. educational outcomes, well-being, non-educational, economic) to improve capability/capacity of the system to support learners with a diversity of profiles EMIS is a granular system, keeping individual records for each learner, allowing analysis of access, participation, outcomes by gender, for vulnerable learners, etc., to ensure equity Systems are in place to identify absenteeism/drop-out/learners out of school or education long term	Evidence of key personnel/groups responsible for data analysis to ensure that EMIS information is used as an evidence base for policy, leading to system improvement Evidence of consultation to consider 'what is success' in national education system, ensuring progress of all learners is recorded and celebrated	M and E for equity: Ensuring all learners have right to IE fulfilled (minimum standard of education for all – e.g. completion rates, meeting standards in core subjects/skills) Equity as fairness/equality of opportunity, e.g. achievement by gender, ethnic group, disability, etc.

Area	Standard	Sample indicators	Sources of verification	Possible actions
Links to school-level information		M and E provides feedback on key elements, e.g. funding, professional learning, pedagogy, curriculum and assessment to assess effectiveness and inform improvement at school level/impact on learners	School-level data regarding learner attainment and wider achievement, participation and engagement in schooling is used to assess what works for learners – linked to data on use of resources	Develop school M and E – self review – key areas to be reviewed consistent across country, use of (verified) data/information

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European Agency Financing Policies for Inclusive Education Systems (FPIES) project 2016–2018 produced a Policy Guidance Framework and a self-review tool to support auditing of policy frameworks, identifying the baseline of the current situation, monitoring policy implementation after a period of time, and identifying progress made.

The review tool provides policy starting points and ideal policy situations with a progressive continuum between these two points. Users can consider evidence and make judgements about their own situation to provide a profile of strengths and challenges.

There is also an overview of key policy issues, goals and objectives which form the basis of the full self-review.

Annex 3. Further examples/materials

School level

European Commission

The following two resources have been developed by the European School Education Platform and are designed to help teachers and school leaders evaluate and improve their school inclusion policies and practices.

European Commission: Toolkit for School Success. The European Toolkit for inclusion and well-being at school promotes inclusive education and tackles early school leaving.

European Commission: Inclusion and wellbeing. This self-assessment tool on inclusion and well-being is designed to help teachers and school leaders to evaluate and improve their school's inclusion policies and practices. It includes a series of targeted questions related to improving school success for all and fostering an inclusive and healthy environment.

National level

Portugal: Final Report from SRSP/TSI Design a System to Monitor the Implementation of the Law on Inclusive Education in Portugal.

UK (Wales) Collecting reliable assessment data for all learners

In Wales, decision-makers have – over a long period of time – developed an inclusive assessment framework. This is one of only a few countries to have in place assessment material for learners with the most complex needs, working at very early levels of development. The Routes for Learning materials for learners with complex needs were developed in 2006 and recently updated. The materials are available with guidance and video examples, case studies and professional learning materials.

The Routes for Learning materials assess early cognitive development, communication and social interaction/interaction with the environment and aim to build a holistic picture of learners, avoiding a 'tick box' approach. Importantly, the materials support progression into the next steps of the national assessment framework which outlines important steps in reading, writing and numeracy developed for learners in early years. Small steps of progress can be planned for within and between progression statements. Steps can be assessed as 'introduced' (in a clearly defined context with significant support),

consolidated (with reduced support) and then applied appropriately across a wide range of contexts/purposes/with different people – with growing confidence.

The images below show the assessment framework – a continuum from Routes for learning to progression statements in core areas and into primary and secondary education. Although the steps are broadly age-related, the framework is designed to be used flexibly according to the needs of each learner.

Routes to …				Foundation Phase			Key Stage 2				Key Stage 3			Extension
Progression statements (not age-related)				Age-related expectations			Age-related expectations				Age-related expectations			Progression statement (not age-related)
Routes for Learning (RfL) routemap	A steps	B steps	C steps	Reception	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	

Figure 5. The assessment framework: a continuum from Routes for learning to progression statements in core areas and into primary and secondary education

Rfl routemap	**A steps**
Shared attention [RfL 40] When the adult and the learner share a stimulus, the learner can attend to the stimulus and then the adult in turn.	**Reading across the curriculum** Learners are able to attend with interest as an adult reads a story, look at, touch and manipulate the book at intervals.
	Writing across the curriculum Learners are able to look at/acknowledge their 'drawing' when adult talks about what they have done
	Numeracy Learners are able to show an interest in number activities and counting with an adult, copy some actions, and/or vocalise at appropriate moments.

Figure 6. The progression from the Routemap into the A steps for reading, writing and numeracy

Examples of models of governance, with stakeholders from different system levels involved in monitoring and evaluation

The following examples show how monitoring and evaluation can be undertaken at different system levels under different governance arrangements. Note the importance of close collaboration between system levels and across system levels through the involvement of a range of agencies and stakeholders. Even in decentralised systems, the

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central level remains important to trigger and steer education through strategic vision, clear guidelines and feedback (European Agency, 2017c, p. 11).

Many European countries frame co-operation with formal agreements, for example in the Netherlands, there are agreements with school alliances and communities responsible for youth care, health and social services.

The Directorate for Education and Training has the major responsibility for monitoring the quality of the school system in **Norway**. School self-evaluation (a statutory requirement) is the primary method of delivering school evaluation and improvement in Norway. The Directorate for Education and Training presents data on a school/municipal/county/national level, grouped into five key areas: Learning outcomes, learning environment, completion of upper secondary education and training, resources and school facts.

Data is used for quality development by all the responsible bodies but in different ways and to varying degrees of detail. The Directorate for Education and Training has developed school analysis tools for schools to help them review their practice. While practices vary, school owners/managers typically monitor results, requiring schools to submit annual plans and occasionally visit schools to conduct a 'quality dialogue' and check compliance of school policies with regulations (taken from TSI EUROCH Deliverable 2.3).

In **Denmark**, municipalities are required to write a quality report every second year on each of the schools in their jurisdiction and submit this to the Agency for Quality and Supervision in the Ministry of Education. The ministry determines compulsory fields to include in the quality report and the information which must be covered in the action plan. The compulsory fields in the quality report are linked to the national 'common objectives' for primary and lower secondary schools. These translate into a set of centrally designed indicators. In the event of poor performance of a school, the municipality must develop an action plan. Municipalities can use additional instruments (e.g. annual measurements of pupils' well-being and parental satisfaction) and can also add their own objectives and indicators in the report (European Commission, 2015).

In **Belgium (French Community)**, the Inspectorate organises a working group to design individual external school evaluations. Working groups typically include teachers and pedagogical advisors from school networks, inspectors, representatives of the Ministry and a university research team. Once the inspection is completed, schools are required to develop an action plan setting out specific objectives based on the diagnosis of needs. They should include strategies for teacher professional development aligned with the objectives (teacher appraisals are conducted by an inspector). The Inspectorate, or an independent educational advisor, may organise training days to support individual schools or a group of schools in this process, and to encourage them to take ownership of the results (European Commission, 2020, p. 12).

In **Belgium (Flemish Community)**, the reference framework for Quality in Education sets out expectations for good quality agreed by education providers and which respect the autonomy of each school. The quality expectations are divided into four categories: 'results and effects', 'development of learners', 'quality development' and 'policy'. The reference framework is the result of a partnership between the Catholic Education Flanders, GO! Education in the Flemish Community, Provincial Education Flanders (POV),

the Education Umbrella Organisation of Towns and Municipalities (OVSG), Consultative Body of Small Education Providers (OKO) and the Schools Inspectorate. The Framework was co-created by many stakeholders including learners, parents, teachers, teaching supervisors, school inspectors, other education experts, researchers, trade unions, etc. (European Commission, 2020, p. 17).

Education **Scotland** has created an online 'national improvement hub' with self-evaluation guides and approaches to whole school evaluation. Resource packs are provided for different sectors (schools/colleges) on different subject areas and topics of interest which go beyond the standards in the external inspection framework. Topics vary from family learning, apprenticeship job training, raising awareness of disability hate crimes, and elements related to the national curriculum and transitioning to secondary education. As inspectors visit a range of schools, they also have the unique opportunity to share ideas on effective practice among schools (European Commission, 2020, p. 24).

In the **Estonian** Education Information System, every school can see the recommendations of an external advisory team on implementation of support services and school management measures. The Ministry of Education and Research external evaluation department regularly monitors the data schools enter, comparing them with the advisory team recommendations. When measures taken by a school are not consistent with the recommendations, clarification is requested and advice provided. Administrative supervision may be initiated (UNESCO, 2021).

Example of cross-level working, linking national/local-level groups/services

In **Serbia**, the Ministry of Education, Science and Technological Development has set up a joint body for co-ordination and supervision of intersectoral committees set up at municipal level. The joint body functions as an advisory group and has representatives from all relevant ministries (health, social affairs, public and local affairs).

The municipality inter-sectoral committees evaluate learners' need for support to overcome physical and social barriers in everyday activities important for education, community life and development. Each committee member monitors the proposed support measures' effects on a learner from their field's perspective. The committee submits mandatory reports on its work at least twice a year (UNESCO et al., 2021).

In 2015 in **Sweden**, the National Education Agency began a programme to increase equity and raise learner achievement. A key feature was to increase co-operation between five key national agencies to tackle a sample of disadvantaged schools, identified by the school inspectorate. Researchers were engaged by the national agency to support schools together with agency staff. First, they analysed local patterns and causes, and then planned for improvement. The work recognised the key role played by dialogue between state and local levels, among other factors, to identify 'gaps' in governance and identify the readiness and capacity of schools to receive support.

Following up on this work, the Nordic network (see deliverable 2.3) noted that support must be tailored to local authorities who are as diverse as learners in schools. They also recognised the importance of developing leadership teams in schools to support principals who can become isolated (TSI EUROCH Deliverable 2.3).

In **Malta**, there are ten colleges responsible for state primary and secondary schools. These are governed by Heads of College Network whose role includes ensuring that schools within the respective colleges collaborate to develop as learning organisations. Schools within the colleges are given the opportunity to improve through participating in the Community of Professional Educators. The Institute for Education also provides continuous professional development modules on the internal review process. Following a whole-week external review, the Quality Assurance Department within the Ministry for Education and Employment embarks on a professional dialogue with the educational institution to provide guidance. The educational institution prepares an action plan on how it will address the recommendations. The Quality Assurance Department performs an unannounced follow-up visit the following school year to monitor progress (European Commission, 2020, p. 13).

Annex 4: Other sources of data/information

European Agency – EASIE data

Since 1999, the Agency has collected data from its member countries. This has developed over time to focus on procedures and outputs that provide comparable information from countries to inform questions relating to five equity issues:

1. Access to mainstream education (the proportion of learners who go to mainstream school)
2. Access to inclusive education (the proportion of learners who spend the majority of their time with their peers in mainstream classrooms)
3. Placement of learners with an official decision of SEN
4. Gender breakdowns of data on placement of learners with an official decision of SEN
5. ISCED level breakdowns of data on placement of learners with an official decision of SEN.

The EASIE data collection therefore covers: the potential (pre)school-age range population; actual school-age range population; all education sectors (state, independent and private); all possible educational placements (mainstream, special classes and units and special schools); non-formal education; learners out of any form of education. In order for country data covering these areas to be comparable, operational definitions of an official decision of SEN and of an inclusive setting were agreed. As the three countries in the EUROCH project are involved in the EASIE work, this may provide a starting point, supporting the extension of data collection (e.g. to different age ranges, to wider groups of vulnerable learners) and potentially looking at data on a regional or community basis.

The **OECD dashboard of indicators** (2022) measures equity in and through education by 35 comparative indicators often disaggregated by age, gender and socio-economic status. The indicators cover two overarching aims and five policy aims, and include educational and economic outcomes. Data is drawn from OECD PISA, TALIS and Education at a Glance, as well as other international databases.

UNESCO OECD Eurostat joint data (UOE) survey includes participation in education and training; education financing and teaching staff; outcomes of education; learning mobility and foreign language learning.

UNESCO data on Sustainable Development Goal (SDG 4)

Target 4.5 focuses on the elimination of disparities amongst all children and equal access to all levels of education and vocational training (UNESCO-UIS, 2020). UN (2016) General comment number 4 on the right to inclusive education (CRPD/C/GC/4) notes that state's parties must develop monitoring frameworks with structural, process and outcome indicators, with benchmarks and targets for each indicator, in line with Sustainable Development Goal 4.

A guide to Article 24 of UNCRPD

The **World Inequality Database on Education** also provides information on the intersection of gender, location and wealth in accordance with the Target 4.5.1 of the SDGs

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