

OECD on INCLUSION

**CENTRE FOR EDUCATIONAL RESEARCH
AND INNOVATION GOVERNING BOARD**

SUSTAINING INCLUSIVE EDUCATION: INCLUDING STUDENTS WITH SPECIAL EDUCATIONAL NEEDS IN MAINSTREAM SCHOOLS:

Lessons from the Case Studies 75501

We have provided selected passages of the text of this remarkable 1999 report for your reading. Full text is available from OECD.

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10. Special education systems have developed in order to cater for those children who stretch regular provision to a point where additional resources must be made available to provide the extra support needed for efficient learning. Although this provision began in special establishments, which continue to exist to this day, over the past 50 years there has been a steadily increasing pressure to educate students with disabilities in mainstream schools. Issues of equity and civil rights have been important determinants, but other important influences include changes in parental attitudes, teacher supply and training, better equipped schools, changes to pedagogical methods and the introduction of information technology. Following the highly influential Warnock Report (1978) compiled in the UK for the Department of Education and Science on students with special educational needs, it has been widely accepted in many countries that on average between 15 to 20 per cent of students will have special needs at some time in their school careers. This means that in an average class of 30 pupils, between 4 and 6 will be in need of different levels of special help. It has also been recognized that these figures will vary substantially according to the degree of deprivation associated with the school districts concerned. An examination of the available data (e.g. OECD, 1995, 1998) shows how closely these estimates are approximated in many countries. Furthermore, the numbers of students identified are increasing.

12. This study, carried out between 1995 and 1998, is based on a close examination of how inclusive practices for a frequently excluded group of students with special educational needs (SEN), namely those with disabilities, are being developed and sustained in a sample of eight OECD countries; Australia, Canada, Denmark, Germany, Iceland, Italy, the United Kingdom and the United States of America. To the extent possible, the same methodology was used in each country. The aims were to describe national, regional and local policies on inclusion and school-based practices and to identify the key issues involved via observations and interviews with policy makers, administrators, teachers and other related professionals, including parents and the students themselves.

13. Educating students with SEN in mainstream schools remains an important goal for many countries and over the past twenty years or so substantial progress has been, although there is still much to achieve. In most countries, a less than useful structural hiatus appears to continue to exist between education and special education systems which allows neither to benefit fully from the positive features of the other.

14. While the debate continues about whether or not it is feasible to include all students in mainstream schools, this report concludes that from organizational, curriculum and pedagogical perspectives, given certain safeguards, there is no reason to maintain generally segregated provision for disabled students in public education systems. In fact, the changes to the ways that schools function in areas such as pedagogy and curriculum development, and in how they are supported by outside agencies as a result of inclusive practices seems only to bring benefits to all students; disabled and non-disabled alike. The teamwork that special education and regular teachers can develop thus effectively reducing student:teacher ratios, and the additional skills brought by special education teachers to the classroom and lesson planning are certainly part of the reason for these advantages.

15. From the many issues discussed seven stand out as being of particular significance in developing and sustaining inclusive education.

funding models for schools and students should not work in such a way as to encourage exclusion. They should work to encourage regular schools to keep students with disabilities in mainstream schools. Moreover, the evidence continues to show that on a per capita basis inclusive systems are less costly to operate than segregated systems. The results of efforts to link costs to outcomes differentiated by settings in a formal cost-effectiveness evaluation, although instructive and providing support for inclusion, are still preliminary.

systems of public accountability for schools, which are of growing importance, should likewise not work in such a way to encourage regular schools to exclude students with disabilities from these assessment frameworks.

pupil assessment should be individualised and support the development of improved pedagogies, curriculum differentiation and school wide curriculum development.

teacher:student and adult:student ratios need to be reduced through the use of specialist teachers and assistants allied to increased flexibility in class size and composition.

the part-time or full-time presence of a classroom assistant, not necessarily a trained teacher, allocated specifically to enable targeted support to be provided for students with SEN.

the functioning of support services such as school psychologists and social workers, should be mainly to empower the school and the teachers to become their own problem-solvers and to stimulate the school as a learning organisation, by passing on their skills and supporting, in the first instance, teachers rather than students.

in the light of the above, *the training systems for teachers and other professionals* appear to be inadequately oriented for preparing trainees for the demands of working in inclusive settings. The paucity of appropriate training would appear to be helping to maintain an unnecessarily high level of segregated provision.

16. Inclusion is more than a technical process. Behind the concept lies a view of the rights of children allied to a new way of thinking about the goals and methods of education. This implies the need to reconsider education law and policy holistically for all students, so that the needs of all students can be met. This means that reviews should cover, not only education systems and schooling but also the ways in which support services co-ordinate their work together with education. Closely linked to these considerations, is the need to develop leadership at national and local levels to assist in carrying through the difficult reforms that will be required.

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SELECTED QUOTES (selection of pages and highlighting by Inclusion Press)

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Conclusions

19. The extensive work carried out by OECD and many other organisations and individuals covering practical examples and research analyses provide a substantial if not overwhelming case to support the full integration of disabled children into mainstream schools. But to achieve this, close attention has to be given to the policy frameworks which guide developments in education, such as parental choice, to the way in which schools are organised and funded, and how teachers and students and their families are supported.

20. The main factors blocking reform to inclusion would seem to be a mixture of lack of political will and human beings' interminable resistance to change. There is, nevertheless, in many countries a move to include children with special needs into mainstream schools, and it is a process which has been followed avidly and described and evaluated in many publications e.g. OECD (1994, 1995, 1997). But it remains a process which is incomplete.

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18. The professionals conducting formal assessments invariably play a key role in day-to-day decisions as to which of the children requiring IEPs should be placed in special schools, and one of their main functions was often that of ensuring that only children really requiring special schooling would be so placed.

Trends to inclusion

19. Some data are available which reveal trends over time. In general terms countries are increasingly moving to more inclusive provision. In Italy this has been an on-going process over the past 20 years. In Australia, as in most of the countries visited, studies by ACER (the Australian Council for Educational Research) across the whole country reveal a decline in the proportion of students in special schools. In New South Wales, a study by MacRae (1996) showed a reduction from 32 per cent in 1988 to 16 per cent in 1997 in special schools. The proportion of those maintained in special classes also declined from 60 per cent in 1988 to 49 per cent in 1997. The proportion increased for those in regular classes from 8 per cent in 1988 to 34 per cent in 1997.

20. But there are also anomalies. In Denmark, one of the pioneers of the inclusive approach, it has already been noted that there was, between 1981 and 1988, a statistically significant trend revealing an increase in the use of special classes in regular schools in preference to integration in regular classes from 24 per cent to 32 per cent with a decline in the use of regular classes over the same period from 26 per cent to 22 per cent. However, the proportion in special schools also declined from 50 per cent to 46 per cent.

21. In Australia, the need for some degree of special school provision is still accepted, especially for students with behaviour problems with histories of violence, and in New South Wales new special schools for this group of students are being opened with the intention of securing safe school environments for the other students.

Funding and Resourcing

22. In most of the countries visited funding arrangements for students with special needs were in a state of flux. This was partly because the form of educational provision was changing towards greater inclusion and partly because the locus of funding was changing under general policies of decentralisation which are impacting on the degree of control effected by central administrations. In addition, relevant data were not readily available. This may be, because up to now the provision of appropriate education for disabled students has been viewed as of greater significance than the costs.

23. However, the move to inclusion and the introduction of the special needs framework seem to be associated, in some countries, with increases in the numbers of children identified and hence the costs to education of supporting them. For example in the UK the numbers of certificated students (with formal statements) and IEPs has increased from 2.1 per cent to 2.9 per cent between 1992 and 1997 (Department for Education and Employment, 1998) In the USA between 1989/90 and 1997 the numbers receiving special education services increased from 7 to 12 per cent (US Department of Education, 1996). Inclusive practices can have an impact since schools, in tightening financial circumstances, may see opportunities for increasing their income by pressing for more children to be assessed and certificated than had been the case before. Greater awareness of the budget has led to the costs of special education, and concerns about its effectiveness, being placed higher on the policy agenda. In federal countries, where there is provision

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A comparison of costs entailed in integrated and segregated provision

40. Calculating the costs of special educational provision is notoriously difficult although it is generally assumed that the per capita cost is higher (OECD, 1995). This seems a fairly safe assumption since student-teacher ratios are more favourable for SEN students and teachers' salaries make up a large proportion of the costs. In New Brunswick in Canada, where there was functional inclusion, the cost of disabled students, estimated at 5 per cent of the student population, was twice that of non-disabled students. In Italy's national

system it was four times for 2.4 per cent. In a specially resourced functionally inclusive school studied in Derbyshire in the UK the cost was 2.5 times with some 3 per cent of students on statements.

41. It is also generally agreed that inclusive settings are less expensive than segregated ones. The question of comparative costs was carefully followed during the course of the study with administrators and schools. Based on the funding allocated to schools, it emerges that for systems as a whole special school provision tends to be more costly than regular school provision; a common ratio being about 1: 1.2. although in Reykjavik in Iceland the ratio was nearer 1:5 reflecting the severe nature of the disabilities contained in their special schools and where inclusion is strongly developed. By contrast, a close inspection comparing per capita costs between a special school and a regular school in the UK revealed the regular inclusive school to be more costly (Annex 3).

42. The most striking example of differences in costs was found in Reykjavik, Iceland, where the most expensively educated student with a disability in an ordinary school was said to be a six year old boy with autism, who was receiving highly specialised individual help. While the cost of providing this was high, local education authority staff calculated this to be no more than the average cost of educating the students attending Reykjavik's special schools.

43. These findings can only be treated tentatively and they need replication both within and among countries. What the data point to, is the importance of analyzing costs in the context of different educational governance policies such as decentralisation. They also argue for giving greater consideration to the links between the costs and the effectiveness of different settings about which there is little if any available data.

44. Among the countries visited, there has been a trend in recent years towards the devolution of the management of funding, from central government to regions, from regions to districts, and in some instances to individual schools. Where the extent of devolution of funds for ordinary education differs from that for special education, this can influence the extent to which inclusive education occurs. If funds for ordinary schooling are borne from district budgets but those for special schooling are managed at regional level, as in parts of Denmark for example, districts may be tempted to press for special schooling for their more expensive students.

45. By contrast, the example from Colorado quoted above shows that the devolution of funding both for ordinary education and for special education right down to the level of the individual school can enhance inclusive education, if allocations fully reflect costs.

Accountability and evaluation

46. Accountability, a policy issue of increasing importance with an international dimension, has particular relevance to a rights based view of inclusion and therefore for those with special educational needs.

47. Accountability may be furthered by national systems of school inspection, designed to assess the extent to which the schools are providing value for money. Another powerful tool in implementing the accountability model is the publicizing of schools' examination results and the results of nationally standardized tests of academic achievement. While both may help to improve school performance generally, they can also have the unfortunate side-effect of militating against inclusive education practices, particularly if the accountability procedures fail to take due account of children's abilities on entry to the school concerned. Doubts raised by central government on the value of mixed ability teaching and smaller class sizes can also be unhelpful in the context of inclusive policies. In Italy, for instance, successful inclusion is predicated on smaller class sizes.

48. Accountability procedures may have the incidental effects of discouraging schools from taking on children who are likely to perform poorly in examinations, of encouraging schools to expel children whom they find difficult to teach, or of tempting schools to omit children with learning difficulties from testing

programmes. Thurlow (1997), refers to some two thirds of students with disabilities in schools in the United States as having been excluded from the 1992 administration of the National Assessment of Educational Progress. Other countries point out that flexibility in the examination process is important for inclusion and schools should also be willing to keep disabled children in school beyond the normal school leaving age if this is requested.

49. The fact that accountability systems can encourage competition between schools can clearly act as a stimulus to their greater effectiveness. It can also, however, deter them from co-operating, and cooperation between schools is often a feature of special education in ordinary schools. For example, schools can help children by providing a free flow of information concerning children moving from one stage of education to the next. Some systems have the flexibility to allow teachers to cross the primary/secondary boundary and carry on giving support to disabled children in the new setting.

50. Evaluation and accountability are central concerns both for teaching practices and systems. Modified assessment systems for those with SEN are seen as especially necessary and also very helpful for developing new systems for all children. IEPs need to be constantly reviewed.

51. At the system level, evaluation of the SEN provision made, and a constant monitoring of the accountability of professional staff involved was a common feature. In one country indicators had been developed based on the provision of equal academic opportunities, performance quality and accountability to the community which were used to evaluate schools and districts.

52. In evaluating the effectiveness of the inclusive education they were providing, the education authorities concerned tended to rely on the informed opinion of their own educational advisers and on the views of bodies representing parents of children with disabilities. There were instances, however, in which investigations had been conducted on a more systematic quantitative basis.

53. In the Woodstock district of New Brunswick, Canada, where the educational strategies used were seen to be particularly effective, in a pan-Canadian comparison, the measured educational achievements of students generally were above what might have been expected on the basis of socioeconomic factors, and the Director of Education concerned publicly attributed these results to inclusive education.

54. In Colorado, United States, rigorous quinquennial reviews of provision were undertaken, and outcomes in the Commerce City district visited had been reassuringly positive.

55. In New South Wales, Australia, the government had commissioned a particularly extensive independent feasibility study of inclusion. While the ensuing report identified weaknesses still to be addressed, it also recognised substantial and beneficial growth over recent years in the education of students with disabilities in ordinary classes.

56. Finally, and not amenable to identification through the measurement of conventional academic achievement, across the countries visited there was the evident effectiveness of inclusion, not only in educating children with disabilities, but also in helping children and adults without disabilities to empathise with these children and to increase their own understanding of the nature of disability. The Danish girl who unobtrusively took the blind child by the hand when the class moved on to the school library provided just one among numerous such examples.

Training

57. In most of the countries visited the training of teachers to work with students with SEN was accorded a high priority. In some, it was a requirement for all teachers, in others, specialist courses were a requirement for teaching those with SEN. Courses are offered at different levels, thus recognising the need for a variety of skills for severe and specific needs and also to develop leadership. Interestingly, a recent US study has shown that teachers working in special education are better qualified than the rest of the teaching staff

(Hocutt, 1996). INSET was also offered in many countries. In Colorado, training particularly emphasised working in included settings and in Italy, too, the on-the-job method of training per se encouraged inclusive approaches. Many local authorities produce training and information packs for those working in the schools or for new employees. Germany was perhaps the big exception with SEN training being heavily oriented to the special school. In Denmark, despite her inclusionary practices, SEN training did not appear to be emphasised at initial teacher training and INSET courses were not always easy to get or very extensive even for those working with students with sensory impairments where very specific knowledge is required.

58. If Denmark is considered to be a special case, perhaps because of her long history of inclusion, countries operating inclusive systems or moving in that direction clearly give training for work with disabilities high priority, and training is almost certainly one of the key elements for success. A high practical content seems to be a feature of many of these offerings and one of the goals should be to change

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111. In reality, there is still substantial debate over the desirability and feasibility of inclusion. Nevertheless, including students with special needs in regular schools is an internationally supported policy initiative that operates alongside others, such as concerns for equity, human rights and the development of strategies for lifelong learning and decentralisation and should be given equal consideration during reviews of education policy and planning. The substantial sums of money devoted to the education of those with SEN can be seen as a positive discrimination in favour of the most disadvantaged in our societies with the goal of equalizing opportunities. But full inclusion remains only a dim reality in many countries despite its demonstrated potential for assisting all students and for creating more efficient, effective and economical education systems.

112. For a variety of reasons, the education systems of OECD countries have grown up during a period in which segregating some students with special educational needs has been seen to be necessary for the efficient functioning of the service for the majority of students. This has led to the development of two systems, operating in parallel, with students with special needs being given additional support to assist in their education.

113. This has had the effect of creating, first, a regular system which does not feel it has to adapt to the needs of all children, and second, a special system which collects the rejects and with considerable additional resources, often in segregated settings, attempts to remedy the failings of the first. Neither of these outcomes is desirable and neither is commensurate with current views on equity and student's rights.

114. Inclusion is a process which aims to correct these developments through changes to the structure and functioning of educational systems and school practices to the benefit of all students. Bringing together the legal and financial frameworks covering regular and special education and making the unified system responsible for the education of all students are fundamental goals.

115. Inclusive schools are learning organisations in which teachers are adapting their pedagogies to the diversity of learning demands presented by individual children. They are doing this in the context of the development of the whole school which is also responding flexibly to individual learning needs through modifications to its structure and function. In this way, the school accepts its responsibility to educate all children, thus challenging the education/special education dualism. Schools do not, of course, operate in a vacuum, and inclusion also implies changes in the way they are controlled by central and local authorities and in the way teachers and other professionals are prepared through pre-service and inservice training.

116. This does not mean that these reforms can be achieved with none of the usual special education resources, quite the contrary. But it does mean that the locus of control and the organization of these resources must change and become a whole school issue. This outcome has implications especially for funding and training.

122. In the cases considered in this report, disabled students generally cost approximately two to four times as much as non-disabled students when educated in mainstream schools and rather more if educated in special schools. The figures here vary very widely and are very influenced by particular circumstances. Preliminary work, carried out in the UK, and reported in Annex 3, had the goal of linking costs to outcomes to compare inclusive and segregated provision. It did not prove possible to carry out a formal cost-effectiveness analysis, because of lack of data, but the pilot information gathered is suggestive that since reading outcomes were superior in the regular school for equivalent students the inclusive setting would prove to be more cost-effective.

123. Funding arrangements can lead to uneven playing fields as far as inclusion is concerned, for instance with included special needs children attracting lower rates of support than equivalent segregated students. Funding arrangements and formulae have come under close scrutiny in many countries in order to avoid such bias and new arrangements may even tilt the pitch in favour of inclusion.

Accountability

124. Accountability is an important, necessary and growing element of education systems. However, developments are often realized for education systems alone not taking into account special education systems and this itself can lead to further obstacles to inclusion. They may, for instance, discourage regular schools from taking on special needs students who are likely to perform poorly in examinations. While this may be true for some special needs students, as noted above, the evidence which exists suggests, perhaps counter-intuitively, that inclusive practices in fact improve the performance of nonspecial needs students. In part, this may be because of the increased attention given to pedagogy and curriculum differentiation which generalizes teaching skills to all pupils. This is an important issue and needs further work. The OECD education indicators certainly provide a potential window to investigate this outcome more fully and even to link costs with outcomes.

Is full inclusion possible?

125. Based on the examples of inclusion described in this book it would be fair to conclude that from an educational point of view there is no limit to the degree of inclusion possible. All children however heavily disabled can be included in regular schools with no detriment to themselves or other pupils.

126. There are three caveats related to full inclusion. The first is essentially political. It would seem that at present, many parents would prefer their disabled children to attend segregated schools. In governance models, where choice is emphasised, in the present circumstances there would seem to be no option but to maintain some segregated provision. The cost appears not to be prohibitive. However, this decision has to be set against the inhibitive effect such an option would have on reform processes and the practicalities of maintaining a dual system. The question then has to be; is there an educational rationale for maintaining segregated provision in a public education system? Given the evidence gathered here, the answer is no!

127. The second caveat relates to students with severe emotional problems who present a danger to other pupils. The ever increasing numbers of violent students appearing at younger and younger ages seems to be a widespread international phenomenon. If such problems cannot be prevented by or contained in the school through the development of the skills and methods identified above then other forms of provision will be needed. In addition, the study completed in the UK, suggests that with well structured, consistent and fair disciplinary procedures rates of exclusion for poor behaviour can be reduced.

128. The third caveat comes from disabled students themselves, who pointed out that from time to time they like to be able to mix with other students with similar disabilities. It would be desirable if provision to meet this human need for solidarity were made available.

Final concluding comment

129. Central governments have a key leadership role to play in developing inclusive policies not only from the point of view of implementing international agreements but also in co-ordinating policies across the education/special education divide. This means giving consideration to the legal frameworks in operation, to coherence in education reform policies, to the development of training for the professionals involved, the involvement of other statutory services and the community at large. Monitoring the course of these reforms is also an essential component not least because substantial sums of money are involved in providing the additional resources that are made available to students with SEN which often emanate from central ministry funds.

130. The importance of leadership at national, regional and local levels in developing and sustaining inclusive education cannot be underestimated. Many of the individuals currently involved have substantial international reputations in the rapidly growing international inclusion movement.

131. Including disabled students does not end with schooling and there is a growing demand for access to post-compulsory educational provision, including universities, to strengthen disabled people's chances on the labour market and their inclusion into society. A review of post-compulsory education for disabled students was carried out as a part of this study and has already been published (OECD, 1997). Further work is being undertaken in this area.