

Financing Policies for Inclusive Education Systems

Resourcing levers to reduce disparity in education

Synopsis



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INTRODUCTION

This short report presents a synopsis of the Financing Policies for Inclusive Education Systems (FPIES) project Synthesis Report. More information on the FPIES project can be found at: <https://www.european-agency.org/projects/financing-policies-inclusive-education-systems>

The premise of the Financing Policies for Inclusive Education Systems (FPIES) project is that policy makers across Europe recognise that funding mechanisms are a critical lever in reducing disparity in education. However, they require more detailed information on the impact of funding mechanisms on inclusive education that can be used to guide their policy developments.

The Financing Policies for Inclusive Education Systems (FPIES) project is a response to this identified policy need. The FPIES project, running from 2016-2018, builds on a previous Agency project: [Financing of Inclusive Education – Mapping Country Systems for Inclusive Education](#) (European Agency, 2016). FPIES is co-funded by the European Agency and the European Commission's [Erasmus+ Key Action 3 'Forward-Looking Cooperation Projects'](#) framework.

A partnership project

The project is based on direct co-operation between eight partners: the Ministries of Education in [Italy](#), [Lithuania](#), [Netherlands](#), [Norway](#), [Portugal](#) and [Slovenia](#), and the European Agency for Special Needs and Inclusive Education. It includes also the partners from [Universitat Ramon Llull](#) as external evaluators of the project with a focus on project activities and outcomes.

The goal of the FPIES project is to systematically examine different approaches to educational financing and identify an effective funding policy framework that work towards reducing disparity in education.

The premise of the FPIES is that the current resource allocation frameworks in all countries are based upon education systems that aim to be increasingly inclusive. These resource allocation frameworks have been developed by countries to enable stakeholders to implement the principles of inclusive education more effectively.

The main project output is a validated open source *Policy Guidance Framework* on financing approaches that aim to reduce disparity in education and work towards all learners' educational and social inclusion and well-being.

PROJECT ACTIVITIES AND METHODOLOGY

The FPIES *Project Conceptual Framework* builds on existing research knowledge from a previous Agency project [Financing of Inclusive Education](#) (2016). The role of the

conceptual framework is to guide project information collection and provide a frame for the analysis of collected information.

The methodology underpinning the information collection in the FPIES project is the peer learning approach which has potential for facilitating self-review and experience exchange to support long term policy development and implementation among participating countries.

The main peer learning activities were six Country Study Visits (CSV), one to each of the partnering countries. Each CSV involved a wide range of relevant stakeholders from ministry, municipality and school level in the host country and ministry level visitors from three of the other 5 partner countries. Participants in the CSVs engaged in a series of pre-agreed activities and discussions as they examined in depth the system of financing special needs and inclusive education in each country with the aim to identify features, challenges and opportunities within the current model. These country level policy exchanges produced meta-level information sources that were used as the basis for the project analysis activities and were recorded in:

- *Country Reports*: The Country Reports identify the main strengths and challenges regarding financing, governance and capacity building underpinning countries' systems for inclusive education. The Country Reports were prepared before the visits and finalised based on information and discussions in the CSVs after the study visits had taken place.
 - [Italy: Country Report](#)
 - [Lithuania: Country Report](#)
 - [Netherlands: Country Report](#)
 - [Norway: Country Report](#)
 - [Portugal: Country Report](#)
 - [Slovenia: Country Report](#)
- *Country Study Visit reports*: The Country Study Visit reports document the main discussion and learning points from each visit by giving a summary of the visit and a comprehensive analysis of discussions.
 - [Italy: Country Study Visit Report](#)
 - [Lithuania: Country Study Visit Report](#)
 - [Netherlands: Country Study Visit Report](#)
 - [Norway: Country Study Visit Report](#)
 - [Portugal: Country Study Visit Report](#)
 - [Slovenia: Country Study Visit Report](#)

The various country reports along with information on the visits is available from the [project web area](#).

The findings emerging from all the FPIES project activities, country reports, study visits and study visit reports, were gathered in the project *Synthesis Report*. The Synthesis

Report supports the development of the *Policy Guidance Framework* by highlighting critical levers for reducing disparity in education through efficient, cost-effective and equitable funding mechanisms.

A main output of the FPIES project is the *Policy Guidance Framework (PGF)*. The PGF presents meta-level findings, information collected and analysed from across countries. The aim of the PGF is to present guidance to policy makers for inclusive education and is being developed with and validated by the ministerial representatives of all Agency member countries.

RESOURCING: ISSUES, FACTORS AND DRIVERS

The FPIES project findings connect funding mechanisms for inclusive education systems to important levers that support the implementation of efficient and cost-effective inclusive education policies. Countries' inclusive education policies are embedded in multi-level and multi-stakeholder systems for inclusive education, covering mainstream and specialist provision. These systems involve cross-ministerial and cross-sectoral mechanisms and include non-educational aspects that affect learners' access to high-quality inclusive education. Thus, the efficiency and cost-effectiveness of funding mechanisms depend on essential levers for resourcing that embed means and resources in an integrated framework for inter-institutional co-operation and co-ordinated provision (European Agency, 2016).

These fundamental topics connect funding mechanisms for inclusive education systems to four resourcing issues that frame the quality of inclusive education and its cost-effectiveness as important topics or policy dimensions to be considered in implementing effective high quality and cost-effective inclusive education policies. These key issues for financing of inclusive education systems are:

- Preventing costly and inequitable exclusionary strategies
- Providing incentives for a school development approach that supports school social responsibility towards inclusive education
- Ensuring innovative and flexible learning environments through capacity building
- Developing transparent and accountable systems for inclusive education.

Each issue is related to several critical resourcing factors. The participating countries see these as essential for determining equitable, efficient and cost-effective inclusive education.

Each critical factor is then connected to key funding drivers. The participating countries regard these as essential means for considering and understanding and consequently implementing critical resourcing factors.

The level of importance of the issues, critical factors and key drivers may vary depending on countries' journeys towards inclusive education. In some countries they may be part of their inclusive education policies, while in others they are a policy goal to be achieved.

Issue 1: Preventing exclusionary strategies

The first key issue for financing of inclusive education systems is *preventing exclusionary strategies*. These may deny learners their right to education as well as unnecessarily label learners as needing an official decision and, consequently, lead to increasing expenditure related to inclusive education. This key issue may be related to three critical factors which can then be connected to several key drivers. These are:

- A political commitment to the right to education for all learners. Key drivers may be connected with countries' financial commitment, with their commitment to excellence for all and with investment in developing support measures for learners
- Resourcing mechanisms that embed inclusive education in local contexts within a community-based approach. A key driver may involve embedding inclusive education as a key task and area of responsibility at all decision-making levels. This may also be achieved by promoting schools' social responsibility towards inclusive education
- Resourcing mechanisms that promote a school development approach. Key driver for this issue involves moving away from a needs-based approach to a whole school approach and implementing resourcing mechanisms that encourage the development of inclusive learning communities.

Issue 2: Promoting a school development approach to inclusive education

Findings from reports and study visits stressed that resourcing mechanisms need to provide incentives for inclusive education by establishing decentralized and flexible systems which lead schools to assume responsibility for developing innovative forms of teaching, by combining performance and equity. This key issue may be related to three critical factors which can be connected to several key drivers. These are:

- Providing incentives for a supportive learning environment. Key drivers supporting this issue may consist of financial support for schools and learners at risk for underachievement and of resourcing mechanisms that foster learning networks.
- Promoting school autonomy. Key drivers encouraging this aim may be flexible use of public funding, fundraising opportunities and organisational flexibility.
- Embedding inclusive education in supportive quality assurance mechanisms at school level. Key drivers may include support for distributed leadership and an adequate combination of means for supportive and innovative learning environments.

Issue 3: Ensuring innovative and flexible learning environments

Funding mechanisms incentivise inclusive education when they promote capacity building mechanisms that empower stakeholders to develop innovative and flexible learning

environments. They incentivise segregation when insufficient adapted teaching or assistance in mainstream settings may lead families to assume that special settings provide better educational assistance and to opt for this type of provision. This key issue may be related to three critical factors which can be related to several key drivers. These are:

- Enabling capacity-building strategies. Depending on countries' journeys towards education, key drivers may involve aiming to empower local communities, schools or learners.
- Enabling special settings to act as a resource for mainstream settings. Key drivers for this critical factor involve incentives for special settings to act as resource centres and embedding inclusive education issues in pre- and in-service training of specialists working in special settings.
- Embedding inclusive education in professional development. Key drivers involve embedding inclusive education in teacher training opportunities, promoting leadership capabilities for developing inclusive schools and including parents in training opportunities

Issue 4: Transparent and accountable systems for inclusive education

The effectiveness of resource allocation mechanisms is connected to the ability of regulatory frameworks to act as a backbone for labelling the system instead of the learners and to balance efficiency, effectiveness and equity issues in a balanced way by focusing on improving the cost-benefit relationships within systems. This key issue may be related to three critical factors which can be linked to several key drivers. These are:

- Network governance strategies promoting integrated systems for inclusive education. Key drivers may involve embedding governance in school networks, in local networks, in an interdisciplinary framework and in an inter-ministerial framework.
- Moving from procedural control mechanisms to accountable systems for inclusive education. Key drivers may involve connecting the funding of inclusive education with an evidence-based resource planning framework and developing monitoring mechanisms that go beyond administrative compliance. They may also entail connecting the funding of inclusive education with an indicator framework mapping data against the goals of inclusive education systems. Embedding inclusive education in reporting and dissemination mechanisms is an additional key driver.
- Embedding inclusive education in a quality assurance system. A key driver may mean reworking existing evaluation procedures and mechanisms for inclusive education issues in a quality assurance system. Developing a clear inclusive education quality assurance framework is a further key driver.

Summary

In summary the findings drawn from all the FPIES project activities connect efficient and cost effective inclusive education systems with four resourcing issues. These resourcing issues, supported by critical issues and key drivers, are seen by participating countries as major facilitating factors underpinning the development of efficient and cost-effective inclusive education systems able to reduce disparity in education.

CONCLUDING COMMENTS

According to the findings drawn from the project Financing of inclusive education (European Agency, 2016) and all the FPIES project activities, there is no ideal way to fund inclusive education. Indeed, as emphasised by communication from the Commission to the European Parliament, the council, the European Economic and Social committee and the Committee of the regions:

There is ... no guarantee that increasing public spending yields automatically better results. In fact, comparing the results of PISA and the level of public spending on pre-school and school education reveals large differences in how efficient Member States make use of their resources. This evidence points to the critical importance of increasing efficiency, i.e. to make best possible use of limited resources to ensure quality, equity, and performance. (European Commission, 2016, p. 3).

Countries' inclusive education policies are embedded in multi-level and multi-stakeholder systems for inclusive education, covering mainstream and specialist provision. In their current form, these systems for inclusive education are far more complex than the general education system and frame the journeys countries take towards inclusive education. Covering in a lifelong perspective all aspects of education, as suggested by the Conclusions of the Council of the European Union, requires therefore to involve cross-ministerial and cross-sectoral issues and include non-educational aspects that affect learners' access to high-quality inclusive education (Council of the European Union, 2017).

In conclusion, the findings drawn from all the FPIES project activities connect efficient and cost effective inclusive education systems with four resourcing issues. These resourcing issues, supported by critical issues and key drivers, are seen by participating countries as major facilitating factors underpinning the development of efficient and cost-effective inclusive education systems able to reduce disparity in education.

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