

7 The key steps to equity and inclusion in education

This chapter provides some conclusions and particularly discusses six key steps that are universally relevant for education systems striving towards equity and inclusion. These include developing a framework on equity and inclusion and embedding it in all areas of education policy; ensuring that the education system is flexible and responsive to the needs of students; including equity and inclusion as principles of both the main resource allocation mechanisms and targeted funding of the education system; engaging all relevant stakeholders in implementing the policy framework in schools and classrooms and strengthening coordination; preparing and supporting teachers and school leaders in developing the competences and knowledge areas for promoting equity and inclusion; and identifying students' needs, supporting them and monitoring their progress.

There is not a single pathway that all education systems should follow towards equity and inclusion. The journey and challenges for each education system will be different, shaped by their unique histories, cultures and population demographics. However, while the appropriate policy interventions for advancing equity and inclusion will thus depend on the individual context, the report highlights some general lessons and core elements to be incorporated in the development of education reforms.

This chapter discusses the key steps, summarised below, that are universally relevant for education systems striving towards equity and inclusion. These steps should be undertaken in parallel, reflecting the fact that advancing equity and inclusion in education requires a holistic approach involving different policy areas.

Six key steps to foster equity and inclusion in education

- Develop a policy framework on equity and inclusion and embed it in all areas of education policy.
- Ensure that the education system is flexible and responsive to the needs of students.
- Include equity and inclusion as principles of both the main resource allocation mechanisms and targeted funding of the education system.
- Engage all relevant stakeholders in implementing the policy framework in schools and classrooms, strengthening coordination.
- Prepare and support teachers and school leaders in developing the competences and knowledge areas for promoting equity and inclusion.
- Identify students' needs, support them and monitor their progress.

Develop a policy framework on equity and inclusion and embed it in all areas of education policy

Developing an equitable and inclusive education system requires a holistic approach. This implies the need for education systems to look beyond policy silos and connect them through a policy framework linking key areas for equity and inclusion (Cerna et al., 2021^[1]). The principles of inclusion and equity are not only about ensuring access to education, but also about developing quality learning spaces and pedagogies that enable students to thrive, and to contribute to shaping a more just and inclusive society (UNESCO, 2017^[2]). A comprehensive policy framework can ensure that education systems incorporate equity and inclusion in all relevant areas, from the design of curricula, to the conception of teaching practices, the capacity building of teaching staff, to the design of data collections and monitoring of student outcomes. A policy framework can also highlight the importance of fostering student well-being along with their achievement, and emphasise the role of schools in the development of inclusive environments.

Policy frameworks should also include a monitoring and evaluation component. Monitoring and evaluation is key to assessing and understanding the needs of both students and school staff and to identifying areas where policy interventions or adjustments are necessary. Monitoring and evaluation systems can be embedded in the policy framework with clearly stated long-term goals, and medium- or short-term priorities, so that the progress of the education system is monitored using these indicators.

Finally, policy frameworks should pay attention to the intersecting needs of students. Intersectionality highlights that student characteristics can interact to create unique student needs to be addressed by schools as well as the education system as a whole. Moreover, intersectionality also considers how students' needs and experiences are shaped by their environment and social contexts (including the school climate) (Varsik and Goročovskij, Forthcoming^[3]).

Ensure that the education system is flexible and responsive to the needs of students

Demographic trends and economic and social changes are resulting in increased diversity in the classroom and requiring education systems to be flexible and responsive to a range of student needs, adopting strategies that are sensitive to the specific local contexts and have equity and inclusion as their guiding principles (OECD, 2018^[4]).

Responsiveness and flexibility need to permeate different education policy areas, from study pathways and school choice, to curriculum and teaching strategies. Indeed, flexibility is one of the key principles in designing an inclusive curriculum (OECD, 2021^[5]), which does not assume identical outcomes for all learners but respects and responds to each student's unique needs, talents and aspirations. Curriculum flexibility also enables schools and teachers to make local decisions about the curriculum, create spaces for innovation, and allows schools to develop local solutions for local challenges.

The study pathways available both at the primary and secondary levels can have significant impacts on students' trajectories, influencing their access to tertiary education and transition to the labour market. Offering students and families a variety of educational pathways and parallel programmes can help ensure an educational provision that matches each student's interests and potential. However, it may lead to increased segregation, mismatches in students' pathway choices and a fragmentation of the educational offer (OECD, 2018^[4]). It is important that study pathways are organised and implemented in a way that responds to the needs of both students and the labour market, with a flexible combination of vocational and academic choices, and that they are equivalent and consistent in quality (OECD, 2012^[6]).

The practices that teachers adopt in the classroom also play an important role in the learning of their students. Students have different learning needs and styles and may benefit from various approaches and teaching strategies - which teachers should leverage to foster their learning potential. Different pedagogies, such as culturally responsive teaching, can support teachers in adapting to a range of diverse needs and supporting all students in their classrooms. Differentiated instruction, as in adopting a range of teaching formats – from one-on-one tuition to small group approaches – can also help teachers support the needs of students.

Overall, the responsiveness of the system, including its individual parts such as school leaders and teachers, is important to address the different needs of its students. Furthermore, the ability to be flexible in the ways of responding to such needs is key to developing an education system that promotes equity among its students and fosters the inclusion of all.

Include equity and inclusion as principles of both main resource allocation mechanisms and targeted funding of the education system

The way funding is allocated to schools and students has fundamental implications for the equity and inclusion of an education system (OECD, 2017^[7]). It is therefore important to ensure that both main allocation mechanisms and targeted funding are designed with the explicit goals of fostering equity and inclusion in education. These two funding methods can serve these objectives through different means and entail different risks (OECD, 2017^[7]). On the one hand, targeted funding allows education systems to better steer and monitor the use of public resources to foster equity and inclusion, but may entail risks such as the multiplication of programmes, a lack of coordination, and inefficiencies. On the other hand, leveraging main allocation mechanisms can reduce transaction costs and streamline the resourcing system. In countries that afford greater discretion to schools regarding the use of funding, the provision of equity funding through main allocations can give school professionals more flexibility in allocating funds to address particular local challenges. However, if not accompanied by strong accountability measures, main

allocation mechanisms may only offer governments limited oversight and control regarding how, and to what extent, funds are actually allocated towards equity and inclusion. Education systems should therefore carefully leverage both funding systems to foster equity and inclusion, taking into account and weighing up the challenges they entail.

With main allocation mechanisms, education systems can incorporate relevant parameters in their central allocation mechanisms' funding formulas to target resources to address specific needs or issues relating to equity and inclusion. For instance, including parameters such as the number of immigrant students or students with special education needs in a funding formula can also be implemented to target additional resources to specific groups.

With targeted funding, there are a variety of resources that can be targeted to support student needs or achieve particular goals. These range from financial transfers (e.g., for the provision of meals or transportation) to the allocation of physical and human resources. Additional funding for specific student groups can also allow educational authorities to address specific needs or goals (OECD, 2012^[6]). This includes scholarships for socio-economically disadvantaged students or transportation for students with physical impairments.

Engage all relevant stakeholders and strengthen coordination across the education system

A range of stakeholders – including teacher unions, local authorities, parents and students, and organisations representing specific groups – contribute to shaping and implementing policies to promote equity and inclusion in education, and should be engaged meaningfully throughout the policy cycle. Initially, this entails involving them in the development of the policy framework to ensure a shared understanding of the goals, means and concepts adopted by the education system. Then, it translates into building partnerships to ensure the implementation of the framework across different government levels (from central to local) and to secure the collaboration with other government areas (e.g., health and social services), and non-state institutions (e.g., teacher unions and employers). Considering the feedback of different stakeholders is also key for education systems to identify challenges, and consequently address them. Stakeholder engagement should thus take the form of partnerships and co-creation activities, going beyond the mere communication of information. Meaningful stakeholder engagement is crucial for promoting equity and inclusion, as a lack of co-operation can lead to barriers in the achievement of policy objectives.

In addition to involving stakeholders in the design and implementation of policies, education systems need to understand and account for the interests of the different stakeholders. In decentralised systems, for instance, central authorities need to evaluate the incentives that drive local education providers and evaluate how their policies may be affecting them. A key step of stakeholder engagement is the analysis of their needs, incentives and likelihood of support – and accounting for these throughout the whole policy cycle.

Engaging stakeholders at the school level is also key in creating a positive school climate that supports all learners in achieving their educational potential. The involvement of parents, guardians and community members in students' learning and school activities has been shown to have a positive impact on students' educational outcomes and on their overall well-being. Parents, guardians and community members can also play an important role in supporting, driving and promoting the successful implementation of initiatives and policies to facilitate the inclusion of diverse students.

Raising awareness of diversity is a foundational step in engaging different stakeholders in policies and practices to advance equity and inclusion in education. It is crucial to mitigate stereotypical or discriminatory beliefs that may impact diverse students in the classroom, ensuring that different

stakeholders recognise the importance of advancing equity and inclusion. This can occur through the promotion of education campaigns and the provision of information resources that can help challenging stereotypes and prejudices in society and to promote values of acceptance and inclusion.

Prepare and train teachers and school leaders in the area of equity and inclusion

Teaching is a complex, multifaceted task, and even more so in a context of increasingly heterogeneous societies where students from a diverse range of experiences and with a variety of lived experiences and learning needs come together in the classroom. In order to be able to create equitable and inclusive learning environments that support all learners in achieving their educational potential, teachers need to be equipped with a range of competences, knowledge and attitudes (Cerna et al., 2021^[11]). Knowledge areas for equitable and inclusive teaching are wide-ranging and may encompass cultural anthropology, social psychology, child cognitive development, integrated learning and second language acquisition (OECD, 2017^[8]). These areas are in addition to a strong understanding of the different dimensions of diversity and of how they may intersect, which is a crucial foundation for the creation of equitable and inclusive learning environments (Cerna et al., 2021^[11]). Supporting the learning and well-being of all students also requires teachers to have strong theoretical knowledge of differentiated instruction and the skills to put this into practice (Brussino, 2021^[9]). In fact, to create positive learning environments, teachers should go beyond learning outcomes, create inclusive environments and foster students' sense of belonging.

Research shows that without adequate learning opportunities throughout the teaching life-course, teachers often feel unprepared to address the diverse needs of students (OECD, 2019^[10]). It is therefore important that education systems prepare and support teachers to promote equity and inclusion, through initial teacher education (ITE) and continuous professional learning. As ITE plays a critical role in shaping teachers' values, competences and knowledge before their entry into the profession, ensuring that equity and inclusion are embedded as core, underlying themes within ITE curricula is vital to ensure that teachers have the knowledge and competences required to create inclusive learning environments that enable all learners to achieve their educational potential. Moreover, ensuring that teachers have opportunities to update and refresh their knowledge and reflect on good practices for equitable and inclusive teaching is crucial in a context of increasing student diversity and other global trends that are changing the nature of the classroom environment. It is therefore important for education systems to provide a wide range of high-quality professional learning options that allow teachers to develop the knowledge and competences necessary for equitable and inclusive teaching.

Ensuring the diversity of school staff is another important component in creating more equitable and inclusive learning environments. Research demonstrates that increased diversity among teachers is important for the learning and well-being of diverse students, with studies showing a range of positive impacts of teacher-student congruence in terms of shared belonging to ethnic groups or national minorities and gender. Greater diversity among teachers can also promote more equitable and inclusive classroom environments, with positive impacts for the student body as a whole. Attracting diverse candidates into ITE programmes is a key step to enhancing the diversity of the teaching workforce, as is ensuring diverse teachers are adequately supported, to promote their retention in the profession. This involves understanding and addressing the specific challenges diverse teachers may face, on top of the stress and demands associated with the profession generally.

Furthermore, school leaders play an important role in facilitating equitable and inclusive teaching, and are central actors in shaping and driving the effective implementation of policies and practices for equity and inclusion. Furthermore, school leadership is crucial in the creation of a positive school climate in which teachers feel supported and collaborate with one another, parents and guardians engage in school life and activities voluntarily, and students feel a sense of belonging.

Identify students' needs, support them and monitor their progress

Identifying students' specific needs is fundamental to promoting equity and inclusion in education. Diagnostic assessments are often used to identify students who are at risk of failure, uncover the sources of their learning difficulties, evaluate their learning needs, and plan for appropriate interventions or remediation strategies (OECD, 2013^[11]). Generally, diagnostic assessments focus on specific areas of learning and produce fine-grained information about individual student strengths, weaknesses and learning needs. Moreover, many diagnostic tools are designed to uncover the causes of students' learning difficulties, and their results are often used to support the students. This support is developed through informing future programme planning, designing differentiated instruction and delivering remedial programmes.

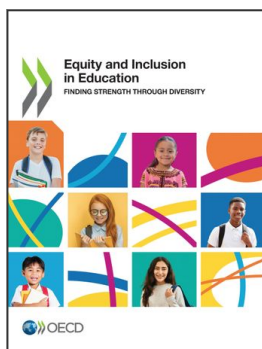
Having identified the needs of students, education systems must then ensure that these needs are addressed in each school and classroom. This entails providing the tools for teachers to help their students, such as Individual Education Plans, and curricular accommodations and modifications. Individual Education Plans are tailored programmes designed on the basis of the individual student's difficulties and strengths, and often prescribe the use of accommodations and modifications. While accommodations help students access the curriculum through instructional or environmental adjustments, modifications involve adjustments to the curriculum to support students' educational progress. Ensuring that students receive the appropriate support can also include the provision of relevant digital and assistive technology, which can aid students in overcoming learning barriers, while also supporting their well-being. Teachers might also need to alter their pedagogical approaches to respond to students' needs. A useful tool that supports teachers and education stakeholders in designing and implementing inclusive teaching through curricula modifications, assessments and pedagogies is the Universal Design for Learning (UDL). The UDL is particularly helpful in increasingly diverse classrooms, as it provides the flexibility necessary to support diverse learning needs, and dismantles barriers to participation and learning for all.

The identification of student needs should not focus solely on learning needs. Schools can play a crucial role in providing access to psychological services (such as counselling or psychotherapy), particularly for students who may otherwise face barriers in obtaining the support they need in this regard. Schools can also help support the well-being of diverse learners through social and emotional learning programmes and trauma-informed teaching strategies.

The assessment of student progress is another key step. In the classroom, the way in which student assessments are designed, implemented and used can have a strong impact on student engagement, motivation and learning outcomes. Assessments should be implemented so as to allow all students to show what they have learned and understood, without being disadvantaged by individual characteristics that are irrelevant to what is being assessed, or by the evaluator's biases. Guidelines for equitable and inclusive assessment design can be developed at the system level that set out how to avoid bias in aspects such as content validity, item selection and method choice. Ensuring equity and inclusion in student assessment processes also entails offering students a variety of ways to demonstrate their knowledge by employing multiple assessment forms and techniques.

References

- Brussino, O. (2021), “Building capacity for inclusive teaching: Policies and practices to prepare all teachers for diversity and inclusion”, *OECD Education Working Papers*, No. 256, OECD Publishing, Paris, <https://doi.org/10.1787/57fe6a38-en>. [9]
- Cerna, L. et al. (2021), “Promoting inclusive education for diverse societies: A conceptual framework”, *OECD Education Working Papers*, No. 260, OECD Publishing, Paris, <https://doi.org/10.1787/94ab68c6-en>. [1]
- OECD (2021), *Adapting Curriculum to Bridge Equity Gaps: Towards an Inclusive Curriculum*, OECD Publishing, Paris, <https://doi.org/10.1787/6b49e118-en>. [5]
- OECD (2019), *TALIS 2018 Results (Volume I): Teachers and School Leaders as Lifelong Learners*, TALIS, OECD Publishing, Paris, <https://doi.org/10.1787/1d0bc92a-en>. [10]
- OECD (2018), *Responsive School Systems: Connecting Facilities, Sectors and Programmes for Student Success*, OECD Reviews of School Resources, OECD Publishing, Paris, <https://doi.org/10.1787/9789264306707-en>. [4]
- OECD (2017), *Proceedings from the Second Policy Forum: Teachers in Diverse Societies*. [8]
- OECD (2017), *The Funding of School Education: Connecting Resources and Learning*, OECD Reviews of School Resources, OECD Publishing, Paris, <https://doi.org/10.1787/9789264276147-en>. [7]
- OECD (2013), *Synergies for Better Learning: An International Perspective on Evaluation and Assessment*, OECD Reviews of Evaluation and Assessment in Education, OECD Publishing, Paris, <https://doi.org/10.1787/9789264190658-en>. [11]
- OECD (2012), *Equity and Quality in Education: Supporting Disadvantaged Students and Schools*, OECD Publishing, Paris, <https://doi.org/10.1787/9789264130852-en>. [6]
- UNESCO (2017), *A Guide for Ensuring Inclusion and Equity in Education*, UNESCO, Paris, <https://unesdoc.unesco.org/ark:/48223/pf0000248254> (accessed on 20 October 2020). [2]
- Varsik, S. and J. Goročovskij (Forthcoming), *Intersectionality in Education: Rationale and practices to address the needs of students’ intersecting identities*, OECD Publishing. [3]



From:
Equity and Inclusion in Education
Finding Strength through Diversity

Access the complete publication at:
<https://doi.org/10.1787/e9072e21-en>

Please cite this chapter as:

OECD (2023), “The key steps to equity and inclusion in education”, in *Equity and Inclusion in Education: Finding Strength through Diversity*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/ca27c1c3-en>

This work is published under the responsibility of the Secretary-General of the OECD. The opinions expressed and arguments employed herein do not necessarily reflect the official views of OECD member countries.

This document, as well as any data and map included herein, are without prejudice to the status of or sovereignty over any territory, to the delimitation of international frontiers and boundaries and to the name of any territory, city or area. Extracts from publications may be subject to additional disclaimers, which are set out in the complete version of the publication, available at the link provided.

The use of this work, whether digital or print, is governed by the Terms and Conditions to be found at <http://www.oecd.org/termsandconditions>.