



IE+ Training Course: Chapter IV

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The other deliverables of the IE+ project can be found on the project webpage www.easpd.eu/en/content/promoting-inclusive-education



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1. Introduction

It is difficult to speak about how to facilitate inclusive education without also addressing how it can be funded. To successfully transition towards inclusive education, inclusive measures and policies must be adequately supported by the appropriate allocation of funds and resources.

From the structuring of a school's overall budget, all the way down to the provision of a free school bus, funding measures can impact the successful inclusion of learners with disabilities.

2. A funding model for Inclusion

As a national, regional or local authority, how you decide to allocate money within your authority's education system immediately impacts on the successfulness of inclusive measures. It is key that the selected funding model incentivises, rather than disincentivises, schools to become inclusive to all learners.

A first challenge to the successful transition towards inclusive education is the continued funding of special education. Known as the "Parallel Model", the funding of special education alongside the funding of mainstream schools creates a competition of resources and outcomes between mainstream schools, who are trying to become more inclusive, and special schools. The continued funding of separate education systems (both mainstream and segregated) has been found to be far costlier to authorities, in comparison to inclusive education systems (Council of Europe Commissioner for Human Rights, 2017, P.14 [34]). Although the initial transition towards inclusive education systems can incur higher costs placing high concentrations of students with disabilities in the same schools, and classrooms oblige public authorities to provide substantial material and human resources to meet the needs of high numbers of students who may have learning difficulties (Council of Europe Commissioner for Human Rights, 2017, P.14 [34]). Studies have found that, in the long run, these costs can be significantly reduced with the adoption of inclusive education systems (Council of Europe Commissioner for Human Rights, 2017, P.14 [34]).

Across Europe special schools continue to be better resourced than inclusive schools (IE+, 2019 [89]). This better access to resources helps to ensure that special schools can meet the needs of their students, creating the impression that special schools can foster a better Quality of Life for the learners with disabilities. Care must be taken when analysing these results however, as they do not represent the whole situation and imbalance of funding between schools. Too often, parents are forced to choose between ensuring that their child's support needs are being adequately met, which can often lead to their placement in a better resourced special school or



unit, and ensuring that their child has the same rights and opportunities as other learners, which is possible in a fully inclusive education system (United Nations Educational, Scientific and Cultural Organization, 2017, p.31[90]).

The goal is to create an education system where these choices become unnecessary (United Nations Educational, Scientific and Cultural Organization, 2017, p.31 [90]).

Effective funding mechanisms provide an incentive for inclusive education when they promote capacity-building mechanisms that empower stakeholders to develop innovative and flexible mainstream learning environments for all learners (European Agency, 2018, p12 [91]). These mechanisms should accommodate the local context and facilitate inclusive education via a community-based approach (European Agency, 2018, p.29 [91]).

Developing this funding model starts with a question:

Who will be the funding target? Schools? Or learners?

Most countries or regions funding systems can fit broadly into one of two funding models, each of which have different implications for the transition towards inclusive education. While some systems may not replicate these models exactly, an understanding of how these models work can help to implement changes for positive change.

2.1 Learner targeted funding

Per-Capita Funding Models target students, and the funding follows the learner. These models consider the special educational needs of learners, including those with disabilities, and will systematically vary the pre-capita funding available to certain categories of students (UNICEF, 2014, p.15 [93]).

These categories group learners by common characteristics: this could be their age, location, perceived social disadvantage or their disability.

Each category is allocated a different weight in the funding system, meaning that schools can receive additional funding for the learners who are deemed to fall into categories that require additional support and funding (UNICEF, 2014, p.16 [93]).

For example (UNICEF, 2014, p.16 [93]):

- A student with no special educational needs may be deemed to have a funding weight of 1.
- A student from a low-income family may be deemed to have a funding weight of 1.2.



- A student with a disability may be deemed to have a funding weight of 1.5.

So, in a class of 30 students:

- 25 students may have no special educational needs: **$25 \times 1 = 25$** .
- 3 students may be from a low-income family: **$3 \times 1.2 = 3.6$** .
- 2 students may have a disability: **$2 \times 1.5 = 3$** .

The combined funding weight for this class would be 31.6 (25+3.6+3). As a result, the funding for this class would be 31.6 x the base funding amount.

For students with disabilities, a single funding weight may be used. Most countries have multiple sub-classifications for identifying differing disabilities and needs however, as a result, it may be preferred to use differential weights for each sub-classification. This differentiation can help ensure that the appropriate resources are allocated to students with additional supports needs (UNICEF, 2014, p.16 [93]).

There are several advantages and disadvantages to the Per Capita system:

Advantages:

- The Per Capita model can allow for greater flexibility, enabling learners to enjoy their right to an education in a school of their choice, as the funding will follow them (UNICEF, 2014, p.16 [93]).
- This model is able to reflect the actual cost of educating students with special educational needs or disabilities and ensure that schools are given the appropriate amount of funding to support these students in their schools.
- Schools can be encouraged to accept learners with disabilities, as via this model the funding follows the student and the school will be eligible to increased funding to support their needs. This model can help promote equity in the education system by providing funding based on the needs of learners.

Disadvantages:

- A weakness of the model is that it has the potential to promote a disability label rather than educational needs (Susan J. Peters, 2003, p.20 [94]). This issue can be overcome with the correct application of a human rights approach, which moves away from a learner's disability and instead focuses on their needs.
- The need to formally diagnose and identify a learner's education needs and disability can drive up costs.



- This model can also provide an incentive for schools to inflate the numbers of children with disabilities in order to increase funding. Auditing can be an important disincentive to stop this practice.
- Providing support to individual learners does not necessarily improve the capacity of the school system (Susan J. Peters, 2003, p.20 [94]).

2.2 School targeted funding

Resource-based models, otherwise known as “through-put models”, target funding at the services (including schools) provided, rather than learners (UNICEF, 2014, p.16 [93]). These models often provide funding based on the payment of a certain amount of special education resources (such as teachers or classroom units) which have been pre-determined at a regional or national level. The aim of these models is to facilitate local initiatives that develop programmes and services, but comprehensive evaluation and monitoring mechanisms are needed to ensure that quality services are being developed and services are constantly seeking to improve (UNICEF, 2014, p.16 [93]).

Resource-based models offer decentralised funding which enables authorities to have more autonomy over how their funding can be best used. This funding model has a number of advantages and disadvantages (European Agency for Special Needs and Inclusive Education, 2016, p.49 [95]):

Advantages:

- In this model funding may support and promote a school-development approach, building upon inclusive design for learning (European Agency, 2018, p.28 [92]).
- In resource-based models the funding focuses on teacher resources and support, rather than a learner’s perceived disability, to provide quality education for students with special needs.
- Research by the European Agency for Special Needs and Inclusive Education found that such a mode of funding promotes financial reasoning with hiring staff, changing curriculum and organising extra support (2018, p.28 [92]).

Disadvantages:

- Several researchers have asserted that resource-based models incentivise schools to fit students into existing programmes, rather than to adapt programmes to meet students’ needs.
- Embedding inclusive education issues in general funding may not appropriately cover the costs of support staff needed to address the range of a pupil’s learning needs.



- There is also the danger that schools may be penalised for success and rewarded for failure. For example, those students who experience success no longer need services, and so funding is lost.

Overall, a school's funding model directly affects changes in thinking and practices in education (European Agency, 2018, p.25 [92]). It is important to ensure that the adopted funding model empowers schools to meet the needs of the learners and allocate the appropriate resources to inclusion. The funding model must also enable schools to embed inclusive education in their local contexts, enabling them to promote inclusion via a community-based approach (Education Agency, 2018, p.26 [92]).

Useful Tool:

Via its participation in the recent “Financing Policies for Inclusive Education Systems” (FPIES) project the European Agency for Special Needs and Inclusive Education has developed a “Financing Policy Self-Review Tool” design for use by policy-makers responsible for developing and implementing policies for inclusive education at national, regional and/or local levels.

The tool aims to support the reflection on financing policies for inclusive education with decision-makers working in different social sectors – education, health, welfare, etc. – at national, regional and/or local levels.

Available in 25 different languages, the Self-Review Tool is an open-source and can be adapted and developed to meet specific country or local situations as needed, provided a reference to the original source is given.

To download it and find out more visit the Agency's website here: <https://www.european-agency.org/resources/publications/financing-policies-inclusive-education-systems-self-review-tool>

Highlights:

- A challenge to the successful transition towards inclusive education is the continued funding of special education.
- An inclusive education system has been found to be less costly than funding a segregated and mainstream education system simultaneously.
- Per-Capita Funding Models target students, and the funding follows the learner.
- Resource-based models, otherwise known as “through-put models”, target funding at the services (including schools) provided, rather than learners.



3. School budget

This content should be localised for each national context

Highlights:

- Provide a list with main ideas.

4. External Opportunities for funding inclusive education

Unfortunately for many schools and authorities, in today's economic climate education budgets are limited and the needed funds to implement inclusive education are not available via traditional funding sources (European Agency for Special Needs and Inclusive Education, p.7 [91]). While the responsibility of funding inclusive education systems lies primarily with authorities, there are a number of alternative funding and financial opportunities available to schools and regional authorities, which can be used to bridge the gap between a school's financial needs and their budget.

Although education is a competence of EU Member States, the European Union has declared its commitment to supporting high quality education through its own budget. As a result, a number of EU funding programmes are available to education providers to support their transition towards inclusive education. Not every EU funding programme is designed to support inclusive education however, and the funding programme best suited to the needs of schools and local authorities will depend on your needs and what you want to achieve.

4.1 Funding innovation and inclusion in your School

The European Union offers a variety of opportunities to foster innovation in education and training. There are a number of EU funding programmes that can support an innovative best practice that you would like to scale up, or help you learn more from the experiences of others:

Erasmus+

Erasmus+ is the EU's programme to support education, training, youth and sport in Europe. Open to organisations, including universities, education and training providers, think-tanks,



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research organisations, and private businesses the programme aims to promote social equity and inclusion via its 3 Key Actions:

Key Action 1: **Mobility.**

Key Action 2: **Cooperation for Innovation and Exchange of Good Practices.**

Key Action 3: **Support for Policy Reform.**

The programme supports opportunities for cooperation, for innovation and the exchange of good practices in education, and also aids partnerships which facilitate the development of evidence-based policy-making by supporting networks and tools for policy implementation.

Localised Information

You can find out more information on the programme's latest funding opportunities on the Programme's webpage (https://eacea.ec.europa.eu/erasmus-plus/funding_en).

Localised Example

European Social Fund

The European Social Fund (ESF) is one of the EU's largest funding programmes which focuses on supporting actions that improve employment and education opportunities across the European Union. The fund finances initiatives that improve education and training, reduce school drop-out rates and ensure that young people learn the skills they need to make them more competitive on the labour market.

Organisations (such as public administrations, workers' and employers' organisations, NGOs, charities and companies) with innovative projects that fulfil the fund's criteria are eligible for ESF funding. ESF funding is allocated at a Member State and regional level.

Localised information on how to access https://ec.europa.eu/regional_policy/en/atlas/managing-authorities/.

Localised Example



4.2 Supporting the training and lifelong learning opportunities of your school staff

Very often basic teacher training requirements do not cover training in inclusive education competences. For many school staff additional training is needed to ensure that they can appropriately implement inclusive education. Via its Key Action 1 programme Erasmus+ enables organisations and schools to have the ability to offer structured study, work experience, job shadowing, volunteering, training and teaching opportunities to staff and learners.

Beneficiaries of the funding are able to spend a period of time in another participating country to participate in structured training courses and events as well as partake in job shadowing opportunities to learn from others in their place of work.

These 'Learning Mobilities' are offered to higher education students and staff, VET learners and staff, school staff as well as adult education staff.

Localised information on how to apply https://ec.europa.eu/programmes/erasmus-plus/contact/national-agencies_en.

4.3 Opportunities in your región

Localised

- Local funding opportunities and mechanisms

Highlights:

- Alternative funding and financial opportunities are available to schools and regional authorities, which can be used to bridge the gap between a school's financial needs and their budget.
- EU funding programmes, such as Erasmus+, the European Social Fund and Interreg can provide funding to support innovative practices which facilitate the inclusion of learners.
- Financing opportunities, via the European Investment Bank, could be available to you to help you meet your social infrastructure needs.

5. Looking to your student and local community



However, simply allocating funds to the provision of educational resources is not an end in itself (European Agency for Special Needs and Inclusive Education, 2016, p.39 [95]). High-quality inclusive education systems must be equitable and non-discriminatory to ensure that all learners with support needs, regardless of their family's socio-economic status, are able to access an inclusive education (European Agency for Special Needs and Inclusive Education, 2016, p.39 [95]).

The use of a per capita model, which incorporates socio-economic status as a factor in the funding weight of students, can begin to ensure that there is an appropriate distribution of resources, so that every child can access, participate and learn in inclusive settings.

5.1 Socio-economic factors

A learner's socio-economic background, either high or low, can impact on their access to inclusive education.

For example, the absence of accessible school transport represents a further barrier to participation in mainstream education for many students. Special schools, due to the additional resources they have, are often more able to provide free school transportation giving vital support to families. If mainstream schools are unable to provide similar services, this can again incentivise parents from enrolling their children in mainstream schools due to the additional logistical and economic pressures it can create and impacting on a learners Quality of Life.

As a result, it is important that authorities and schools take a closer look at students, their families and the wider community to ensure that all aspects of the educational system promote inclusion, regardless of economic status.

5.2 Privatisation of therapy

Localised.

5.3 Access to information

Localised.

Highlights:

- High-quality inclusive education systems must be equitable and non-discriminatory to all learners with support needs, regardless of their family's socio-economic status.



5 Conclusions

In this chapter we have addressed how the funding mechanisms and structures associated with schools can impact on the successfulness of inclusive education. Starting with an assessment of the possible school funding models available to local authorities, this chapter has focused on funding measures on a number of levels, including a school and community level as well as on a European level.

6 Summary

- It is crucial that authorities develop clear funding mechanisms which enable schools to meet the needs of their learners and become more inclusive. Per-Capita Funding Models, in which funding follows the learners as they progress through their education are effective in promoting inclusive education and equity in the education system.
- A school's budget must be carefully considered to ensure that the school's resources are used for the benefit of all students.
- Additional funding and financial opportunities are available to schools and regional authorities and can be used to bridge the gap between a school's financial needs and their budget.



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