Financing of Inclusive Education

Webinar 8 - Companion Technical Booklet





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About the author: Crawford Dedman is a Special Education and Inclusive Education consultant. He currently works as a Senior Policy Advisor at the Ministry of Education in Ontario, Canada. Crawford has over 17 years of professional experience project managing high-profile projects in education policy and funding, with a focus on inclusive education and the delivery of integrated services between the education, health and children's service sectors. Crawford holds both a Master of Public Administration from the Queen's University School of Policy Studies and a Master of Business Administration from the Rotman School of Management at the University of Toronto.

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Coordination: Paula Frederica Hunt Editing: Stephen Boyle Layout: Camilla Thuve Etnan

Please contact: Division of Communication, UNICEF, Attn: Permissions, 3 United Nations Plaza, New York, NY 10017, USA, Tel: 1-212-326-7434; e-mail: nyhqdoc.permit@unicef.org



With major thanks to Australian Aid for its strong support to UNICEF and its counterparts and partners, who are committed to realizing the rights of children and persons with disabilities. The Rights, Education and Protection partnership (REAP) is contributing to putting into action UNICEF's mandate to advocate for the protection of all children's rights and expand opportunities to reach their full potential.

Financing of Inclusive Education

Webinar Booklet

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What this booklet can do for you

The purpose of this booklet and the accompanying webinar is to assist UNICEF staff and our partners to understand basic concepts of financing **inclusive education** (IE), with an emphasis on children with disabilities, and recommendations on what financing models and strategies support a **rights-based approach** to inclusive education.

In this booklet you will be introduced to:

- Why funding is important to inclusive education.
- What are the funding models and approaches that support inclusive education?
- Suggestions and practical tips on how to support the implementation of funding models and approaches that support a rights-based approach to inclusive education.
- Helpful resources.

This booklet is not intended as an extensive guide on financing inclusive education programming or a detailed history on this topic.

For information on the following related topics, refer to the other modules in this series:

- 1. Conceptualizing Inclusive Education and Contextualizing it within the UNICEF Mission
- 2. Definition and Classification of Disability
- 3. Legislation and Policies for Inclusive Education
- 4. Collecting Data on Child Disability
- 5. Mapping Children with Disabilities Out of School
- 6. EMIS and Children with Disabilities
- 7. Partnerships, Advocacy and Communication for Social Change
- 8. Financing of Inclusive Education (this booklet)
- 9. Inclusive Pre-School Programmes
- 10. Access to School and the Learning Environment I Physical, Information and Communication
- 11. Access to School and the Learning Environment II Universal Design for Learning
- 12. Teachers, Inclusive, Child-Centred Teaching and Pedagogy
- 13. Parents, Family and Community Participation in Inclusive Education
- 14. Planning, Monitoring and Evaluation

How to use this booklet

Throughout the document you will find boxes summarizing key points from each section, offering case studies and recommending additional readings. Key words in bold throughout the text are included in a

glossary at the end of the document. Also at the end there is a list of online knowledge communities to help you deepen your understanding of the issue.

If, at any time, you would like to go back to the beginning of this booklet, simply click on the sentence "Webinar 8 - Companion Technical Booklet" at the top of each page, and you will be directed to the Table of Contents.

To access the companion webinar, just scan the QR code.





Acronyms and Abbreviations

CBR	Community-Based Rehabilitation Programmes
CEE/CIS	Central Eastern Europe and Commonwealth of Independent States
CRC	Convention on the Rights of the Child
CRPD	Convention on the Rights of Persons with Disabilities
EADSNE	European Agency for Development on Special Needs Education ¹
EASNIE	European Agency for Special Needs and Inclusive Education
EFA	Education for All
IE	Inclusive Education
NGOs	Non-governmental organizations
OECD	Organization for Economic Co-operation and Development
SEN	Special Education Needs
UN	United Nations
UNESCO	United Nations Education, Scientific and Cultural Organization
UNICEF	United Nations Children's Fund

I. Introduction

Quality education is a right for every child. The **Convention on the Rights of the Child** (CRC) and the **Convention on the Rights of Persons with Disabilities** (CRPD) both clearly express the vision of ensuring quality education for all and the importance of providing the required supports to develop each child's potential.

In line with the CRC and CRPD, and UNICEF's mission, inclusive education is the approach UNICEF employs to ensure every child receives an inclusive quality education. Inclusive education as defined in the Salamanca Statement promotes the "recognition of the need to work towards 'schools for all' – institutions which include everybody, celebrate differences, support learning and respond to individual needs".²

While inclusive education is a broad concept that includes all groups of children, for this series we will focus on children with disabilities. For further information about the CRC and CRPD, please refer to Booklet 1 in this series.

It is difficult to speak about measures to promote the implementation of inclusive education without discussing how it gets funded. The reality for many countries is that national budgets are often limited, official development assistance is lacking and parents often cannot afford the direct and indirect costs of education. In order to realize the goals of inclusive education for all, countries require the financing and support of educational services for students with disabilities. This challenge applies to regions with developed education systems (with parallel systems of special education, such as the Central Eastern Europe and Commonwealth of Independent States [CEE/CIS] region), as well as developing regions (i.e., Africa, parts of Asia) with less-developed education systems (without parallel systems of special education).

Interventions to promote inclusion do not always need to be costly. Several cost-effective measures to promote inclusive education have been developed in countries with scarce resources. These include:

- Multi-age and Multi-ability classrooms.
- Initial literacy in mother tongues.
- Trainer-of-trainer models for professional development.
- Linking students in pre-service teacher training with schools.
- Converting special schools into resource centres that provide expertise and support to clusters of regular schools.
- Building capacity of parents and linking community resources.
- Utilizing children themselves in peer programmes.³

Education financing reforms have taken place in most countries in CEE/CIS. However, mechanisms to ensure that adequate funding targets students who need it most need to be improved and education systems' financial efficiency further increased.⁴ The report *Call for Action. Education equity now: Including all children in quality learning* identified the need for governments to take action in reforming their governance systems and financing mechanisms in order to enable them to address the needs of disadvantaged children, including children with disabilities. Investments in quality and inclusiveness can be offset by efficiency gains with existing budgets and can generate savings.⁵

One thing is certain: the methods, channels and criteria for funding adopted by local and/or national authorities can either facilitate or inhibit the process of inclusion.⁶

Tony Booth's analysis in a 2003 UNESCO paper makes interesting observations about structures that support funding inclusion:

- A study of inclusionary policies in 17 countries concluded that countries in the best position to support inclusive education are countries with a strongly decentralised system, where budgets for special needs are delegated at the central level to regional institutions (municipalities, districts, and/or school clusters).⁷
- When the allocation of funds to separate settings directly influences the amount of funds available for mainstream schools and when the school support centres play a decisive role in the allocation of funds, this seems to be effective in helping achieve inclusion.⁸

Summary

- In line with the CRC, CRPD and UNICEF's mission, and the organization's commitment to equity, inclusive education is the approach UNICEF advocates to ensure every child receives a quality education.
- Funding is a key issue for governments to consider when implementing inclusive education. Challenges related to funding are experienced in both well-developed education systems (with parallel systems of special education, i.e., Western Europe, CEE/CIS region) and less-developed systems (without parallel systems of special education, i.e., Africa, parts of Asia).
- Governments need to take action now in reforming their systems in order to address the needs of students with disabilities in mainstream schools.

II. The Situation of Financing Inclusive Education to Support Children with Disabilities

Key Points

- Critics of inclusive education have claimed that inclusive education is not economically viable and that the cost of integrating students with disabilities in mainstream schools is more expensive than maintaining a segregated education system.
- More recent evidence and research on this subject reveals that inclusion is more cost effective than maintaining a segregated system. Increasingly, countries are realizing the inefficiency of supporting multiple systems of administration, services and special schools.

Although there has been a movement towards adopting inclusive education policies in many countries and regions around the world, often budgets and financial frameworks have not supported inclusive education. For example, in the CEE/CIS region a number of governments have committed to inclusive education in their national education plans and strategic reports. These include: Armenia, Azerbaijan, Belarus, Bosnia-Herzegovina, Georgia, Kosovo, the Former Yugoslav Republic of Macedonia, and Serbia.⁹ However, budgetary support, action frameworks, indicators and implementation commitments are not included, and inclusive education is often not harmonized with general education planning. For example, within CEE/CIS Bosnia-Herzegovina and Georgia are the only two countries in the region that have strategic plans for inclusive education in place that integrates policy with financial support for implementation.¹⁰

For many UNICEF countries with National Committees, policy and financial frameworks have supported inclusive education. For example, in Australia a 2010 report compiled by the New South Wales (NSW) Legislative Council described supports to students with disability in general schools as consisting of "the school learning support team, the Learning Assistance Program, the Integration Funding Support Program, the School Learning Support Coordinator, and the proposed School Learning Support Program". The role of each of these supports is to assist the classroom teacher to adapt and modify curriculum and environments to ensure they can be accessed appropriately by students with disability.¹¹

The financing of inclusive education has been impacted by the policies towards and the understanding of inclusion. As a starting point, it is important to differentiate between the concepts of **integration** (the physical presence of children with disabilities in mainstream classes and schools) and **inclusion** ("a process of addressing and responding to the diversity of needs of all learners through increasing participation in learning, cultures and communities, and reducing exclusion within and from education¹²"). These differences result in an inconsistent approach in government support for inclusive education. A few facts:

 The Former Yugoslav Republic of Macedonia, Ukraine and Russia do not make a distinction between integration and inclusion. Despite referring to both integration and inclusion in their strategies, their actions do not support either practices to include students with disabilities in school. In fact, the majority of children with disabilities in these countries are neither included nor integrated in regular schools and are instead educated in special facilities.

- Some countries such as Kosovo, Russia, Serbia, Armenia, Belarus and Uzbekistan indicate an intention to transform special schools into resource centres to support inclusive education in mainstream schools.
- Montenegro has mobile teams which travel among mainstream schools to offer advice on educating students with special needs.
- Serbia has conducted a study on the costs of implementing inclusive education policies, which will feed into the development of a per-capita financing formula.
- In Armenia, the Ministry of Education and Science is currently piloting the full inclusion of students in mainstream education in one region.¹³

Inclusive education has had a history of greater support in some high- and middle-income countries. A prime example of this is the United States (US). For example, data from the US shows progress (on average) with regard to inclusive placements for students with special education needs (SEN). The number of pupils with SEN spending 80 per cent or more of their school day in regular education classrooms has risen in the US from 32 per cent to 54 per cent from 1989 to 2005. At the same time, the number of pupils with SEN served in separate facilities declined early in this period, from 6 per cent to 4 per cent, where it has remained for the past 15 years (the remaining percentages of pupils with SEN are in other categories of placement between these two extremes).¹⁴

Note: in most instances, financing of inclusive education takes into consideration students with special education needs, not only students with disabilities. Therefore, for the purposes of this booklet the group of students referred to by SEN includes (but is not exclusive of) students with disabilities.

Opponents of inclusive education have defended maintaining a segregated education system on the basis that inclusive education is not economically viable and the costs of maintaining this system are high. Scarce financial and human resources are the most often-cited barriers to the expansion of inclusive education.¹⁵ A recent review of inclusive education in the CEE/CIS region found that Albania, Serbia, Moldova, Russia and the Ukraine all mention the lack of financial guidelines and limited funds to mainstream schools as key factors inhibiting the implementation of inclusive education. For this region, the problem is rooted in historical investments in segregated systems of special schools, and the lack of political will to make inclusive education available to all.¹⁶

Funding has been cited as a major challenge for governments in Africa to implement inclusive education. In these countries, the major constraint is the serious shortage of resources – lack of schools or inadequate facilities, lack of teachers and/or shortage of specialist teachers/staff, lack of specialized learning materials and equipment, etc. to assist students with disabilities in mainstream schools.¹⁷ Several studies have revealed that implementation of inclusive education in Namibia, South Africa, Zambia and Zimbabwe has been delayed by a lack of financial resources.¹⁸

Although the responsibility for providing education (i.e., inclusive and otherwise) to students is a state responsibility, it remains the case for many developing countries that non-governmental organizations (NGOs) play a significant role in providing governments with financial support to implement projects that further inclusive education. A United Nations Educational, Scientific and Cultural Organization (UNESCO) review of special education in developing countries indicated that in 26 of them NGOs were considered the major source of funding, while in several others NGOs provided up to 40 per cent of the costs of special-needs provision.¹⁹

An example of this kind of support leading to success with inclusive education is a project from the Lao People's Democratic Republic. Save the Children and the Swedish International Development Cooperation Agency provided long-term funding and technical support for an Inclusive Education Project from 1993–2009. The project resulted in a centralized, national approach to the development of policy and practice in inclusive education. Services began in 1993, when a pilot school opened in the capital, Vientiane. There are now 539 schools across 141 districts providing inclusive education and specialized support for more than 3,000 children with disabilities.²⁰

Although funding inclusive education implementation is a key issue for many governments, financing inclusive education is not more costly that maintaining a segregated education system. Increasingly, countries are realizing the inefficiencies with multiple systems of administration, organisational structures and services and special schools.²¹ In addition, a growing body of evidence points to inclusion as being more cost effective than segregated education systems.²² A few facts:

- An Organization for Economic Co-operation and Development (OECD) report in 1994 estimated average costs of special needs education segregated placements to be seven to nine times higher than placements for children with disabilities in general education classrooms.²³
- More recent OECD research found that special education per-capita costs were around 2½ times those of regular education. This is mainly accounted for by salaries, since the teacher/pupil ratio is more favourable for students with disabilities.²⁴
- An evaluation of inclusive education in Albania in 2005 found that the education costs for students with disabilities in regular classrooms was 1/16 the average cost of educating those students in special institutions.²⁵
- In 2009, the UNICEF Country Office in Armenia commissioned a study examining the cost structures of institutionalisation, which found that transitioning from residential care towards more community-based services will save money both in the short and long term.²⁶
- Recent US studies from three states (California, Illinois and Massachusetts) show a positive relationship between inclusion and academic results for students with SEN. In addition, two of these studies where the data was compared (California and Illinois) found no relationship between inclusion, educational results and average per-pupil special education spending. This data suggests that inclusion is a cost-effective and efficient way of improving outcomes for students with SEN. It also suggests that higher degrees of inclusion can be achieved without overall increases in spending.²⁷

To learn more go to:

- Convention on the Rights of the Child, United Nations, 1989
- Convention on the Rights of Persons with Disabilities, United Nations, 2008
- <u>The Salamanca Statement and Framework for Action on Special Needs Education</u>, UNESCO, 1994
- Policy Guidelines on Inclusion in Education, UNESCO, 2009
- Guidelines for Inclusion: Ensuring Access to Education for All, UNESCO, 2005
- Overcoming Exclusion through Inclusive Approaches in Education: A Challenge & A Vision Conceptual Paper, UNESCO, 2003
- Best Practices in Inclusive Education For Children with Disabilities: Applications for Program
 Design in the Europe & Eurasia Region, USAID, 2010
- Inclusive Education: An EFA Strategy for All Children, World Bank, 2004
- Inclusive Education at Work: Students with Disabilities in Mainstream Schools, OECD, 1999
- World Report on Disability, WHO & World Bank, 2011

Notes



III. Challenges to Financing Inclusive Education

Key Points

- Centralized policy and funding approaches to education remains a key barrier to introducing financing reforms that support the implementation of inclusive education.
- Although there have been many challenges with governments moving in the direction of implementing inclusive education, progress has occurred with decentralising education financing in many regions.
- Often it is not just the level of resources that is the issue, but also how the funds are distributed and allocated.

Many traditional funding approaches across regions (e.g., CEE/CIS) are highly centralised. Although governments are gradually decentralising authority with education policy, it is often a longer path towards decentralising financing.²⁸ A widespread trend reported in studies of funding formulae is towards decentralisation, where governments grant monies through block funding to local-level authorities who then allocate the money determined by local need.²⁹

There are strong linkages between decentralising government responsibilities to the local level and financing inclusive education. Decentralisation enables services to be adapted to local needs, and allows for greater local democracy and accountability. It also lends support and encouragement for innovative practices to meet the specific needs of communities, schools and learners within local communities.³⁰

When discussing the key models that support the movement towards inclusive education, in Section IV, it will be clear that funding systems will need to implement an element of community-based financing mechanisms. In order for them to work effectively, both political authority and finances must be decentralised. Although there have been some clear challenges, some progress is happening on this front. A few facts:

- About half of the 10 provinces in Canada have grant systems in which revenues are pooled from local and provincial/territorial sources and re-distributed on a per-pupil formula basis to local school districts.
- In Australia, over the last decade many state and territory governments have moved towards funding disadvantaged students and schools through per-student-based funding formulas, where resources may be provided as a loading or a weighting to a school's base resource allocation.³¹
- In the CEE/CIS region at least nine countries have initiated some kind of per-pupil funding to promote greater inclusion.
- The World Bank has piloted per-pupil funding structures in several CEE/CIS countries, including Bosnia and Herzegovina, Uzbekistan and the Former Yugoslav Republic of Macedonia.³²
- In Turkey, a special fund exists to accelerate private inclusive education interventions.

Furthermore, experience has shown that this process is far from being straightforward and many factors can affect the ability of systems to transform. A few facts:

- In Serbia, where the federal government funds 85 per cent of the education system, with the municipality covering the remainder, local governments sometimes are not functional enough to proceed without solid capacity-building efforts.
- In Armenia, where decentralisation efforts have been under way for several years, there has been a growing gap in the linkages between policymakers and practitioners due to the failure to establish clear roles and definitions prior to decentralising many processes.³³

To learn more go to:

- The Right of Children with Disabilities to Education: A Rights-Based Approach to Inclusive Education. UNICEF, 2012
- UNICEF Disabilities Website
- UNICEF Education Website

Notes

IV. What are the Key Models for Funding Inclusive Education?

Key Points

- There are three key models to determine funding for students with disabilities.
 - Input or per-capita models.
 - Resource-based models.
 - Output-based models.
- Each approach offers both advantages and disadvantages in relation to:
 - Adequacy/sufficiency in meeting the goals of supporting inclusive education.
 - Promoting equity and inclusiveness for students with disabilities.
 - Efficiency/cost effectiveness to administer at the local/school level in order to reach the greatest number of students with disabilities.
- Please refer to the chart at the end of this section for key information about these funding models.

Per-Capita Models

Overview

Per-capita funding formulas count the number of students identified as having special education needs, including children with disabilities. The primary basis under a per-capita formula is the number of students. Under this type of formula, funding follows the student.³⁴

In simple form, a per-capita formula is:

• The per-capita amount X the number of students meeting the criteria.

In practice, the per-capita amount systematically varies for certain categories of students. These variations in per-capita funding amounts are sometimes referred to as 'funding weights'. Larger per-capita amounts may be specified for such factors as:

- Differing grade/age.
- Curriculum.
- Location.
- Minority language.
- Social disadvantage.
- Disability status.

An example of the total per-capita allocation for a primary school with 100 students might be:

- 60 students with no special needs: (60 X 1 = 60)
- 30 students of social disadvantage (30 X 1.2 = 36)
- 7 students of language minority (7 X 1.5 = 10.5)
- 3 students with a disability $(3 \times 2.5 = 7.5)$

For this school the total weighted student count equals: 114 (60 + 36 + 10.5 + 7.5). Funding for this school would equal: 114 X the base funding amount. (**Note:** the weights shown above are for illustrative purposes only.)³⁵

For students with disabilities, a single funding weight may be used. However, to the extent that a country has multiple sub-classifications for students with disabilities, it may be preferred to use differential weights. For example in the United States, where approximately 13.5 per cent of all public school children are identified as having special education needs, multiple classifications are used. A primary category of disability is determined for each child. Costs are shown to vary considerably within and across these categories.³⁶

Funds may go to regions or municipalities either as a:

- Flat grant.
- Pupil-weighted scheme* (*Note: as shown in the description of this model).
- Census-based count, whereby all students are counted and an equal percentage of special-needs students is assumed across regions/municipalities.³⁷

Per-capita models are often found in many high- and middle-income countries such as the US, Canada, Australia and New Zealand. In addition, countries with high proportions of students in special schools most often use per-capita models, where services are financed by the central government on the basis of child counts.³⁸ Countries in Europe working with this type of model at the school level are Austria, Belgium, France, Germany, Ireland, the Netherlands and Switzerland. Countries with relatively low percentages of students in special schools or classes such as Cyprus, Spain and Sweden also use this model.³⁹

Advantages

- Funding and resources follow the student, which would encourage local schools to accept children with disabilities, and overcome concerns about the capacity of schools to provide the necessary supports.
- Allows flexibility with expanding or contracting national budgets in that the base funding amount may vary over time.
- Reflects the actual costs of educating students with disabilities.
- Students are funded equitably based on their education needs. In addition, other factors may be included in the funding formula to provide greater equity, (i.e. urban versus rural cost differences, segregated versus mainstream schools).
- Some studies report that this approach increased parental power in parents' ability to get the right support for their children.⁴⁰

Disadvantages

- Costs are often high due to the need to diagnose and identify individual students to access funding.
- This model can provide an incentive to inflate the numbers of children with disabilities in order to increase funding. However, auditing can be an important disincentive to submitting false data.
- Focuses on the disability and not the student's educational needs.
- Models that do not include a pupil-weighted approach may not fully capture the costs of educating a wide variety of students with disabilities. For example, it does not account for wide variations and intensity of services that may be required by students within categories of disability (e.g. Autism Spectrum Disorders) as well as across categories of disability (i.e., Learning Disabilities vs. Developmental Disabilities).⁴¹

Resource-Based Models

Overview

Resource-based models are also known as 'through-put' models because funding is based on services provided rather than on child counts. Resource-based models are usually accompanied by fiscal policies that mandate qualified units of instruction or programmes.

Countries that focus on this type of decentralised special-needs funding are Denmark, Finland, Greece, Iceland, Norway and Sweden. Here, municipalities decide on how special-needs education funds should be used, and on the degree of funding.⁴²

Some examples of resource-based models include:

- Finland, where the majority of schools are supported by at least one permanent special-education teacher. These teachers provide assessments, develop individualized education plans, coordinate services and provide guidance for mainstream teachers.⁴³
- Germany, where teachers in 'integrated' classes are allocated extra time depending on the severity of a student's disability. For example, integrated classes must be comprised of 18 'regular' pupils and two-three with special needs.
- Austria, where three types of integration classes are defined and funded:
 - Inclusive education classes comprised of 20 students (four of whom have disabilities).
 - Small classes.
 - Cooperative classes.⁴⁴

Advantages

- A 17-country study by the European Agency for Development on Special Needs Education (EADSNE) recommended through-put resource-based funding as the best option at the regional (municipality) level, with the caveat that it should be accompanied by some form of output funding (i.e., funds tied to student outcomes).⁴⁵
- Funding focuses on teacher resources and support to provide quality education for students with special needs.

These models encourage local initiatives to develop programmes and services. However, without some evaluation or monitoring mechanism there is no incentive to produce quality programmes or to seek improvements.

Disadvantages

- It has been criticised by several researchers that this model contains a built-in incentive to fit students to existing programmes, rather than to adapt programmes to meet student needs.
- Schools may be penalized for success when students no longer need services, and funding is lost or reduced.

Output-Based Models

Overview

Although many countries have recognized the need for accountability and evaluation of programmes for cost-effectiveness, few countries use an output-based model to any great extent.

This model was used in the US federal government programme No Child Left Behind. This programme tied funding and school accreditation directly to student achievement scores, with severe economic sanctions for low student performance scores. In the United Kingdom (UK), publication of 'league tables' (essentially, report cards of student test scores in individual schools) has been tied to increasing numbers of special-needs students in segregated settings.⁴⁶

More recently, the Australian Government has moved towards a more 'outcomes-based' approach to funding disadvantaged students and school communities, through the National Schools SPP and National Partnerships. Under these arrangements, the government sector (and the non-government sector for the National Partnerships) have greater flexibility in how funding is used, provided that schools are working towards achieving the national objectives and reform directions agreed by all state/territory governments under the National Education Agreement.⁴⁷

Advantages/Disadvantages

- This approach may increase the number of special-needs students in segregated settings, as it provides a built-in incentive for schools to refer students to special education programmes in order to avoid reporting the achievement scores of students who are below grade level.⁴⁸
- It penalizes schools for circumstances beyond their control, such as high mobility and absentee rates of students, inadequate funding for current textbooks and adapted curriculum materials.⁴⁹

Summary	of Key	Funding	Models
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Model	Definition	Key Features	Advantages/Disadvantages	Countries
Per Capita	 Counts the number of students identified as having special education needs. The primary basis is the number of students. 	 A per-capita formula is: the per-capita amount X the number of students Amount varies for certain categories of students. These variations are sometimes referred to as 'funding weights'. Larger per-capita amounts may be specified for such factors as: Differing grade/age. Curriculum. Location. Minority language. Social disadvantage. Disability status. 	 Reflects the actual costs of educating students with disabilities. Costs are often high due to the need to diagnose and identify students to access funding. Incentive to inflate the numbers of children with disabilities in order to increase funding. Focuses on the disability and not the student's educational needs. 	US, Canada, Australia, New Zealand Austria, Belgium, France, Germany, Ireland, the Netherlands Switzerland, Cyprus, Spain and Sweden, etc.
Resource Based	 Funding is based on services provided rather than on child counts. 	 Resource-based models are usually accompanied by fiscal policies that mandate qualified units of instruction or programmes. For example, in Germany integrated classes must be comprised of 18 'regular' pupils and 2-3 with special needs. 	 Funding focuses on teacher resources and supports. Encourages local initiatives to develop programmes and services. Provides incentives to fit students to existing programmes, rather than adapt programmes to meet student needs. Schools may be penalized for success when students no longer need services, and funding is lost or reduced. 	Austria, Denmark, Finland, Greece, Iceland, Norway and Sweden, etc.
Output Based	 Ties funding directly to student achievement scores. 	 This model was used in the US federal government programme No Child Left Behind. This programme tied funding and school accreditation directly to student achievement scores, with severe economic sanctions for low student performance scores. In the UK, publication of 'league tables' (essentially report cards of student test scores in individual schools) has been tied to increasing numbers of special-needs students in segregated settings. 	 This approach increases the number of special-needs students in segregated settings, The model has a built-in incentive for schools to refer students to special education programmes. Penalizes schools for circumstances beyond their control, such as inadequate funding for current textbooks and adapted curriculum materials, etc. 	Part of the US & UK systems. Few countries use an output-based model to any great extent.

To learn more go to:

- <u>Special Needs Education in Europe</u>, European Agency for Development in Special Needs Education (EADSNE), 2003.
- Special Needs Education (SEN). Country Data 2012, EADSNE, 2012.
- <u>Conference on Inclusive Education for Children with Disabilities in CEE/CIS</u>, UNICEF, Moscow, 2011.
- Financing of Special Needs Education: A Seventeen-country Study of the Relationship between Financing of Special Needs Education and Inclusion, EADSE, 1999.

Notes



V. Recommendations on Financing Models in Support of a Rights-Based Approach to Inclusive Education

Key Points

- Irrespective of the funding approach adopted, it needs to be able to: support the principals of inclusive education; adhere to principals of fairness and equity of funding at the community and school level; provide the necessary resources to students with disabilities to further the implementation of inclusive education in the classroom, etc.
- Financing inclusive education through a per-capita funding model has many advantages with:
 - Adequacy/sufficiency.
 - Equity and inclusiveness.
 - Efficiency/cost effectiveness.
- Furthering inclusive education in countries with less-developed education systems and financing mechanisms is not as dependent on the funding model. For these countries, the creative and cost efficient ways they provide resources to their communities to support inclusive education has the greatest impact.

Every funding model has advantages and disadvantages. The determination of the most appropriate approach will be informed to a significant degree by the existing educational environment.⁵⁰

Whichever funding model is used, it should:

- Be easy to understand.
- Be flexible and predictable.
- Provide sufficient funds.
- Be cost-based and allow for cost control.
- Connect special education to general education.
- Be neutral in identification and placement.

While a commitment to supporting a funding model that flows adequate funding for inclusive education is important (e.g., per-capita model), the ways funding is allocated can have a powerful impact on implementing inclusive education. Models of funding are needed that:

- Are supported by the commitment to the universal right to education, and the obligation to provide it on an inclusive basis at all levels.
- Take into account the academic and social benefits of inclusion, as well as economic factors.
- Provide an adequate flexible-funding and fair-allocation formula, which is vital at the school and community levels for the initial programme start-up and continuation, staff incentives and salaries, training, special equipment, community organisations/services and parent support.
- Guarantee both a minimum level of support through fixed grants, which are adjusted according to poverty/wealth indices at the national level, and resource-based formulas to allocate funding for needed services at the local level to meet the needs of individual classrooms and learners.
- Recognise that while initial investments in inclusive education programmes can be high, they are more efficient in the longer term as they benefit the wider general education system and a larger number of students.
- Provide adequate financial support to ensure a country can manage the successful transition from donor-provided funding (when applicable) to the country funding the ongoing costs of inclusive education within the funding model.
- Provide incentives towards a unified system of education service and one which encourages investment in preventative approaches in education, as well as effective support for learners identified as having specific needs.
- Do not require that children are labelled and categorised in order to receive appropriate services rather, they should be geared towards providing flexible, effective and efficient responses to learners' needs.
- Promote inter-sectorial collaboration from relevant services, connected to support students with disabilities.⁵¹

Key Advantages of Per-Capita Financing for Students with Disabilities

The recommendations in the section *Moving Forward - Recommendations on Models In Support of a Rights-Based Approach to Inclusive Education* will not offer a 'one size fits all approach' and will take into consideration many factors based on each region and country. However, there is a wide body of research and best practices discussed in the UNICEF Position Paper *The Right of Children with Disabilities to Education: A Rights-Based Approach to Inclusive Education* recommending that countries in the CEE/CIS region move towards per-capita funding to support the growth of inclusive education.

The following box provides a summary of the key advantages of per-capita financing for students with disabilities.

Adequacy/Sufficiency:

- Funding and resources follow the student, which would encourage local schools to accept children with disabilities and overcome concerns about the capacity of schools to provide the necessary supports.
- Allows flexibility with expanding or contracting national budgets in that the base funding amount may vary over time.
- It forces governments to consider how much funding is needed to reach national educational goals for students with disabilities.

Equity:

- Funding is provided on the basis of a consistent, clear and transparent framework, and children with disabilities throughout the country are treated equitably based on their education needs.
- Students are funded on an equitable basis throughout the country based on their education needs. In addition, other factors may be included in the funding formula to provide greater equity, (i.e., urban versus rural cost differences, segregated versus mainstream schools).
- It allows for improved tracking of the use of funds and the consequent outcomes. In this way, the educational and social outcomes associated with placement in institutional and mainstream schools can be more easily compared.

Efficient/Cost Effective:

- Flexibility allows students to be served where their needs can best be met at a fixed level of spending.
- Differential funding weights can be used to create fiscal incentives for practices that align with government commitments to inclusive education. For example, per-capita funding can be a powerful vehicle for de-institutionalising services for students with disabilities in segregated settings to placement in neighbourhood schools and inclusive classes.
- Over time, neighbourhood services for students with disabilities are likely to cost less and serve more students with disabilities.⁵²

While debates over what funding model should be adopted that best supports inclusive education is a discussion point among the more-developed education systems, less-developed education systems are focused on adopting cost-efficient ways to provide resources to support inclusive education. Consequently, for these governments strategies for developing and supporting inclusive education draw from a broad range of resources – both internal and external to schools. The following highlights some of these measures:

Teacher training and professional development strategies

- Since personnel costs constitute the bulk of funding needs in education, if countries can use these resources in a more cost-effective way, it will free up more resources to support inclusive education.
- A train-the-trainers model is a cost-effective model to deliver teacher training and professional development. In Latin America, a regional training strategy called a 'cascade model' involved 28 countries. Two specialists per country were trained in supporting students with special education needs. These specialists trained an additional 30 in each country, until 3,000 were ultimately trained.⁵³

- In Costa Rica, the response to their severe teacher shortage was to provide in-service training to mainstream teachers, as well as paying them extra hours for teaching additional classes for special education students. These classes were offered after school as a supplemental support to the children's participation in regular morning classes.⁵⁴
- Botswana has localized pre-service teacher training by including special education curricula in teachers colleges throughout the country, producing many skilled teachers.⁵⁵ In Malta, support for training originated with NGOs. The Eden Foundation linked its services to the University of Malta to develop a programme for inclusive education with the Department of Psychology, Faculty of Education.⁵⁶
- Countries use the expertise of people with disabilities to train teachers. For example in Mozambique, where severe teacher shortages exist, deaf adults are used as teachers of the deaf. Furthermore, Papua New Guinea involved deaf adults in provision of services and to build support for inclusive education at the community level.

Converting special schools into centralized resource centres

- Some countries have made progress in the conversion of special schools into resource centres. Interdisciplinary teams often include staff with medical, health, psychological and special education competencies.⁵⁷
- Future plans envision resource centres as assisting in school planning, conducting assessments and directly delivering services to students in community schools. Several countries in the CEE/CIS region (Russia, Serbia, Belarus and Kosovo), Europe as well as the US and Canada have adopted this model.
- In El Salvador 'support rooms' were set up in mainstream primary schools to provide services to students with disabilities. The services included assessments of students, instruction on an individual basis or in small groups, support for general education teachers, and speech and language therapy and similar services. Support-room teachers work closely with parents, and receive a budget from the Ministry of Education for training and salaries. In 2005, about 10 per cent of the schools nationwide had support rooms.⁵⁸
- In Bangladesh, the cluster approach is used to provide in-service education of teachers through resource centres. South Africa uses the model to reach out to rural areas. In India, the Divine Light Trust converted its special school for blind individuals into an outreach and resource centre.⁵⁹

Community-Based Rehabilitation Programmes

- **Community-Based Rehabilitation** (CBR) has proved to be one of the most successful programmes in developing countries to enhance inclusive education. The programmes have been successful in supporting inclusive schools with the necessary materials, equipment and technical advice they require in order to function smoothly.⁶⁰
- In Kenya, itinerant CBR workers conduct an 'open education' programme in rural areas. These workers
 visit blind children in their homes and work with the parents to provide early stimulation activities that
 will assist them in entering school. The workers also provide Braille lessons in schools, and attend
 teacher staff meetings to assist in planning and curriculum adaptation. Tanzania uses a similar model of
 itinerant CBR workers in schools, funded by the Tanzanian Society for the Blind.⁶¹
- An itinerant programme in Viet Nam provides another example of linking CBR and inclusive education. A programme co-sponsored by the Health and Education services provides CBR workers to work with teachers to make low-cost rehabilitation aids for disabled pupils in classrooms, and to conduct joint surveys to identify student needs.
- Coordination between CBR and inclusive education has several cost-saving advantages, alleviates the

severe teacher shortages and gives confidence to regular classroom teachers to devise ways of meeting children's learning needs.

Parents

• Building on the strengths and motivations of parents to mobilize resources for inclusive education, Jamaica developed an early intervention project for children with disabilities that is home-based, and relies on parents to provide services to the children after initial training. Follow-up visits to parents provide on-going support. The cost is US\$300 per year, per child, which is considerably less than the cost of special education in Jamaica.⁶²

To learn more go to:

- Inclusive Education: An EFA Strategy for All Children, World Bank, 2004.
- <u>The Right to Inclusive Education for Children with Disabilities: Good Practices in the CEE/CIS</u> <u>Region and Recommendations to the Albanian Government, World Vision, 2012.</u>
- Inclusive Education Initiatives for Children with Disabilities: Lessons From The East Asia And Pacific Region, UNICEF, 2003.
- Examples of Inclusive Education: India, UNICEF Regional Office for Southeast Asia, 2003.
- <u>Examples of Inclusive Education: Bangladesh</u>, UNICEF Regional Office for Southeast Asia, 2003.

Notes

VI. Moving Forward

Now is the time to take action. While you can wait for further guidance from the other webinars in this series, you can also immediately identify advocacy opportunities to highlight the case for the importance of supporting the country in which you are working to take action towards improving the financing of inclusive education.

Although this webinar emphasizes the merits of governments moving towards a per-capita model to support the implementation of inclusive education, the 'on-the-ground' reality for you in diverse offices around the world is that the most appropriate approach to financing inclusive education will be determined by the existing educational environment you are operating in. For some of you this means promoting and/or supporting the movement towards per-capita models, while for others it means supporting a diverse range of cost-efficient ways for governments and NGOs to provide resources to support inclusive education.

In the box below are some of the activities to continue dialogue with the levels of government you are interacting with in the country you are working in.

Activity

To get you started, please reflect on the following statement and fill in the lines below: "In my country, the funding mechanisms that are already in place to support inclusive education are..." (think about what types of funding mechanisms/approaches are already in place, to establish a baseline in your country)

To get you started, please reflect on the following statement and fill in the lines below: "In my country, improving the funding of inclusive education can be implemented by..." (think about what types of investment, recruitment and capacity support would be needed to achieve improvement) "In my country, I can support local capacity building to promote development towards improved funding of inclusive education by..."

"In my country, here are three key activities/actions I can try to conduct over the next 12 months to support local governments and NGOs within my country to help improve the funding of inclusive education..."



VII. Addressing a Few Common Questions

In per-capita funding models, what are funding weights and how do they connect to students with disabilities?

In simple form a per-capita formula is the per-capita amount X the number of students. However, in practice the per-capita funding amount systemically varies for certain categories of students. Larger per-capita amounts may be specified for such factors as:

- Differing grade/age.
- Curriculum.
- Location.
- Minority language.
- Social disadvantage.
- Disability status.

These systemic variations in per-capita funding amounts are sometimes referred to as funding 'weights'. These weights are prescribed multiples of the per-capita funding amount specified for a 'base' student. For example, a base student might be one with no special conditions (e.g. disability status) in primary school.

The following is an example of a jurisdiction using a single funding weight for each factor:

An example of the total per-capita allocation for a primary school with 100 students might be:

- 60 students with no special needs: (60 X 1 = 60)
- 30 students of social disadvantage (30 X 1.2 = 36)
- 7 students of language minority (7 X 1.5 = 10.5)
- 3 disability students (3 X 2.5 = 7.5)

For this school, the total weighted student count equals: 114 (60 + 36 + 10.5 + 7.5). Funding for this school would equal: 114 X the base funding amount. (Note: the weights shown above are for illustrative purposes only.)

The important factor here is that the higher weighting for students with disabilities generates a higher amount of funding for the school on a per-student basis. This will help address the student's needs in an integrated setting. In addition, it provides greater incentives to the school to implement inclusive education and helps ensure that schools retain students with disabilities.

In per-capita funding models, why is it advantageous to use differential weights for students with disabilities to encourage the implementation of inclusive education?

For students with disabilities, a single funding weight may be used. However, to the extent that a country has multiple sub-classifications for students with disabilities, it may be preferred to use differential weights.

In the US, where approximately 13.5 per cent of all public school children are identified as having special education needs, multiple classifications are used within a category of disability. A primary category of disability is determined for each child. This is because costs are shown to vary considerably within and across these categories.

This is important because on average the costs required to serve students with different disabilities varies. For example, in 1999/2000 the average expenditure to educate a student with Autism Spectrum Disorders in the US was \$18,790, while the average cost for a student with a Speech Language Disorder was \$10,558. Using this example, countries would use this information to assign a higher weight to the formula for students with autism to reflect their higher level of need within the school.

Differential weights in the funding model allocate higher levels of funding to serve students with higher needs. This helps to provide additional supports in the school to help further inclusive education (e.g., education assistants), as well as other para-professional supports (i.e., speech language pathologist, occupational therapist, etc.). The funding model does not over-allocate funds to serve students with lower-level needs.

Overall, differential weights help facilitate inclusive education because the funding follows the student and it helps local schools to serve students with disabilities if they bring with them supplemental revenues to at least partly offset their additional cost.

Notes

Additional Resources

UNICEF does not take responsibility for the accessibility of any documents or websites listed.

Books and Papers

- The Right of Children with Disabilities to Education: A Rights-Based Approach to Inclusive Education. UNICEF, 2012
- <u>The Salamanca Statement and Framework for Action on Special Needs Education</u> The Salamanca statement is a major international policy document, outlining the global consensus on the needs for educational reform and the policies and strategies needed to include children with disabilities in the education system. UNESCO, 1994.
- Inclusive Education This report brings together experience from a wide range of countries. It identifies
 underlying principles, which inform practice across a wide range of contexts, and provides brief
 illustrations from a number of countries. It aims to help education administrators and decision-makers
 to move beyond the making of policy commitments towards the implementation of inclusive education.
 UNESCO, 2002.
- <u>Special Needs Education. Country Data 2012</u> Every two years European Agency for Development in Special Needs Education conducts a data collection exercise with all Agency member countries. We collect key quantitative data about the numbers and placements of pupils recognised as having SEN, as well as accompanying qualitative information to put the statistics into context. European Agency for Development in Special Needs Education, 2012.
- Education for Children with Disabilities Improving Access and Quality. Document can be found at Department for International Development, United Kingdom, 2010.
- Making Schools Inclusive: How Change can Happen, Pinnock H, Lewis, I. How non-governmental organizations can help school systems in developing countries become more inclusive. Taking examples from 13 countries around the world it describes case study programmes that: target specific groups of vulnerable children; build inclusive school communities; promote change throughout an education system; and address financial barriers to inclusive education. Save the Children, 2008.
- <u>Schools for all: Including Children With Disabilities in Education</u> Primarily for educators, focusing on including children with disabilities in schools, but also helpful for NGOs, community-based rehabilitation workers, Disabled People's Organisations and community groups involved in advocating for and helping to design inclusive education efforts. Save the Children, 2002.
- Inclusive Education: Where There are Few Resources This book aims to provide a background and critical overview of key issues, concepts and strategies in relation to inclusive education that are relevant to situations where economic resources and access to information are limited. S. Stubbs, Norway, 2008.
- <u>A Human Rights-Based Approach to Education for All</u> This document brings together the current thinking and practice on human rights-based approaches in the education sector. It presents key issues and challenges in rights-based approaches and provides a framework for policy and programme development from the level of the school up to the national and international levels. UNESCO and UNICEF, 2007.
- Education for Some More Than Others? A Regional Study On Education In Central and Eastern Europe and the Commonwealth of Independent States (CEE/CIS) – This study is a follow-up to Education for All?, UNICEF Innocenti Research Centre's (IRC) 1998 Regional Monitoring Report in

Central and Eastern Europe and the Commonwealth of Independent States. That report found a marked increase in disparities in the quantity and quality of education throughout the region since the onset of transition. In response, it recommended Twelve Steps towards Education for All to remedy the problems. UNICEF, 2007.

- Inclusive Education Initiatives for Children with Disabilities: Lessons from the East Asia and Pacific Region – This paper highlights good examples of inclusive education initiatives in Cambodia, China, Laos, Viet Nam and Thailand. The final chapter sums up lessons learned and provides recommendations for 'ways forward' in meeting the goals of equal access to quality education for children with disabilities in the next decade. UNICEF, 2003.
- Inclusive Education in Europe: Putting Theory into Practice. International Conference: Reflections from Researchers – Summary of the November 2013, European Agency for Special Needs and Inclusive Education (the agency [formerly known as the European Agency for Development in Special Needs Education] conference in Denmark on inclusive education. EASNIE, 2013.
- Conference Report: Regional Ministerial Education Conference: Including all Children in Quality
 Learning The conference, co-organised by the Government of Turkey and the UNICEF Regional Office
 for Central and Eastern Europe and the Commonwealth of Independent States, was held in Istanbul
 from the 10 to 13 December 2013. The objectives of this high-level event were to: (i) launch the Call for
 Action 'Education Equity Now! Including all children in quality learning', (ii) provide a renewed impetus
 and foster greater political commitment for education equity, (iii) share good practices across the region
 to advance primary and secondary education participation and learning, and (iv) accelerate reforms at
 country level and to contribute to on-going regional discussions on the Post-2015 Development Agenda.

Knowledge Communities and Web Platforms

- Enabling Education Network (EENET) One of the most comprehensive websites on inclusive education, with heavy emphasis on publications written by and for experts and advocates for inclusive education from the global south. Regularly updated, the website provides information on a wide range of education-related topics education for children with different types of disabilities, issues of family, the girl child, teacher education and evaluation of different approaches.
- <u>'Inclusive Education in Action'</u>, developed in cooperation with the European Agency for Development in Special Needs Education.
- Online knowledge community 'Building Inclusive Societies for Persons with Disabilities'

For a more complete or updated list of resources visit <u>www.inclusiveeducation.org.</u>

• Add here your own resources:

Glossary of Terms

Convention on the Rights of Persons with Disabilities and its Optional Protocol (<u>A/RES/61/106</u>) was adopted on 13 December 2006 at the United Nations Headquarters in New York, and was opened for signature on 30 March 2007. There were 82 signatories to the Convention, 44 signatories to the Optional Protocol, and one ratification of the Convention. This is the highest number of signatories in history to a UN Convention on its opening day. It is the first comprehensive human rights treaty of the 21st century and is the first human rights convention to be open for signature by regional integration organizations. The Convention entered into force on 3 May 2008.[iii] For more information visit: <u>http://www.un.org/disabilities/</u>.

Convention on the Rights of the Child is an international human rights treaty adopted and opened for signature, ratification and accession by the UN General Assembly resolution 44/25 on 20 November 1989 in New York, and entered into force on 2 September 1990, in accordance with article 49. A child means every human being below the age of eighteen years unless under the law applicable to the child, majority is attained earlier. For more information visit: <u>http://www.ohchr.org/EN/ProfessionalInterest/Pages/CRC.aspx</u>.

Disability is the result of the interaction between long-term physical, mental, intellectual or sensory impairments and various barriers in the environment that may hinder an individual's full and effective participation in society on an equal basis with others.

Education for All represents an international movement and commitment to ensure that every child and adult receives basic education of good quality. It is based both on a human rights perspective, and on the generally held belief that education is central to individual well-being and national development. It first gained global attention at the World Conference on Education for All in Jomtien, Thailand, in 1990. For more information visit: <u>http://www.un.org/en/globalissues/briefingpapers/efa/index.shtml</u>

Inclusion is where there is recognition of a need to transform the cultures, policies and practices in school to accommodate the differing needs of individual students, and an obligation to remove the barriers that impede that possibility.

Inclusive Education is "a process of addressing and responding to the diversity of needs of all learners through increasing participation in learning, cultures and communities, and reducing exclusion within and from education. It involves changes and modifications in content, approaches, structures and strategies, with a common vision which covers all children of the appropriate age range and a conviction that it is the responsibility of the state to educate all children."[vi]

Integration is where children with disabilities are placed in the mainstream system, often in special classes, or in a general classroom with no or inadequate adaptations and support.

Mainstream Schools are schools that are available to any pupil, regardless of whether they have a disability.

Persons with Disabilities include those who have long-term physical, mental, intellectual or sensory impairments which, in interaction with various barriers, may hinder their full and effective participation in society on an equal basis with others.

Segregation is when groups of children are purposefully separated from the majority because of difference. For example, children with disabilities can be classified according to their impairment and allocated a school designed to respond to that particular impairment.

Special Schools are those that provide highly specialized services for children with disabilities and remain separate from broader educational institutions; also called segregated schools.

Endnotes

- 1. This organisation has changed names and is now called the European Agency for Special Needs and Inclusive Education (EASNIE)
- 2. Salamanca Statement https://www.european-agency.org/sites/default/files/salamanca-statement-and-framework.pdf
- **3.** UNESCO, <u>Policy Guidelines on Inclusion in Education</u>, Paris, 2009. p.11 & UNESCO, <u>Guidelines for Inclusion: Ensuring</u> <u>Access to Education for All</u>, Paris, 2005. p.19.
- 4. UNICEF, <u>Call For Action. Education equity now: Including all children in quality learning</u>, 2013.
- 5. Ibid. p.7.
- 6. UNESCO, Overcoming Exclusion through Inclusive Approaches in Education: A Challenge & A Vision Conceptual Paper, Paris, 2003.
- 7. Save the Children Fund UK, <u>Making Schools Inclusive: How change can happen Save the children's experience</u>, London, 2008., p.49.
- 8. Ibid.
- 9. UNICEF Regional Office for CEECIS, <u>The Right of Children with Disabilities to Education: A Rights-Based Approach to</u> Inclusive Education Position Paper, 2012. p.19.
- 10. Ibid. p.19.
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- 13. UNICEF Regional Office for CEECIS, op.cit.
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- **16.** UNICEF Regional Office for CEECIS, op.cit.
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- 20. World Health Organisation & World Bank World Report on Disability, Geneva, 2011 p.220.
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- 22. UNICEF Regional Office for CEECIS, op.cit. p.39 & Peters, S., op.cit. p.23.
- 23. OECD, Inclusive Education at Work: Students with Disabilities in Mainstream Schools, Paris, 1999.
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- 25. USAID, op.cit. p.8.
- 26. Andreeva, E, <u>Costing Residential Care Institutions and Community Based Services and Forecasting Needs for Services in the Context of Child Care Reform in Armenia</u>, 2009.
- 27. EADSNE, op.cit. p.77.

- 28. UNICEF Regional Office for CEECIS, op.cit.
- 29. Peters, S., op.cit.
- **30.** Ibid.
- 31. Australian Government, <u>Review of Funding for Schooling: Final Report</u>, Canberra: 2011, p.162.
- 32. UNICEF Regional Office for CEECIS, op.cit.
- **33.** Ibid.
- 34. Parrish T, <u>Per-Capita Financing of Education and Equity Issues</u>, Conference On Inclusive Education For Children With Disabilities, UNICEF Regional Office for CEECIS & UNICEF Country Office in the Russian Federation, 27-29 September, 2011.
- **35.** Ibid.
- 36. Ibid.
- 37. Peters, S., op.cit. & UNICEF Regional Office for CEECIS, op.cit. p.40.
- **38.** EADSNE, <u>Special Needs Education in Europe</u>. Brussels: European Agency for Development in Special Needs Education, 2003. & Peters, S., op.cit.
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- **40.** Pjil, S. & A. Dyson <u>Funding Special Education: a three-country study of demand-oriented models</u>. Comparative Education, 34(2). p. 261-279.
- **41.** EADSE, <u>Financing of Special Needs Education: A seventeen-country Study of the Relationship between Financing of Special Needs Education and Inclusion</u>, Denmark, 1999.
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- 59. Peters, S., op.cit.
- 60. Charema, J., op.cit.
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