MONITORING FRAMEWORK
FOR INCLUSIVE EDUCATION
IN SERBIA

SUMMARY

The Monitoring Framework for Inclusive
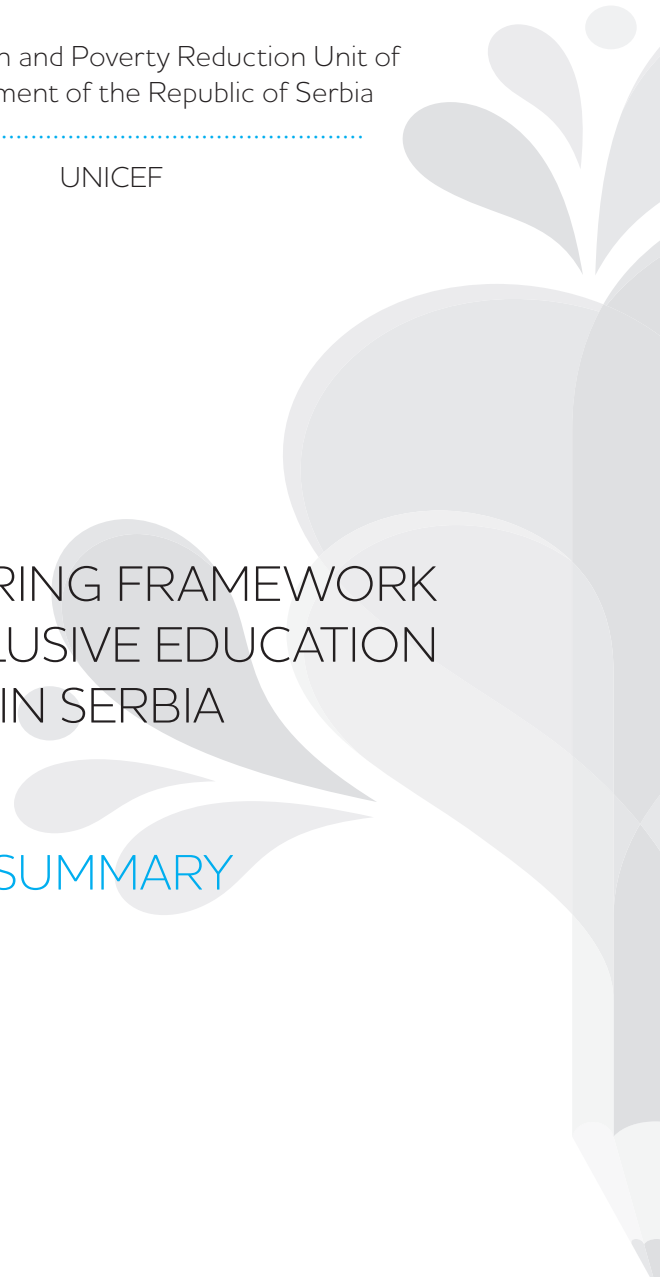Education in Serbia is available at:
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Social Inclusion and Poverty Reduction Unit of
the Government of the Republic of Serbia

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Education inclusiveness was defined as the strategic orientation of and a legal requirement for the Serbian education system in 2009 (Law on the Foundations of the Education System). The development of an inclusive education system is supported by: the establishment of new structures at the national, local and school levels, training for teachers and schools, additional funding earmarked for school development, support networks development, parent empowerment, public campaigns, promotions and production of many professionals' and parents' guides.

The Monitoring Framework for Inclusive Education in Serbia (Framework) emerged as a result of a joint initiative of the Social Inclusion and Poverty Reduction Unit, UNICEF, Ministry of Education, Science and Technological Development of the Republic of Serbia, Fund for an Open Society and Institute of Psychology.

The initiative to develop the Monitoring Framework for Inclusive Education was launched with the aim of providing the Ministry of Education, Science and Technological Development and the Institute for Education Quality and Evaluation with a foundation for systematic and objective monitoring of the progress achieved in the area of inclusive education, with a view to further implementation and promotion of inclusive education in Serbia based on the collected data.

The Framework is defined so as to recognise the specific features of the national, municipal and school level, and contains defined indicators and expected indicator values, as well as example monitoring instruments.

The foundations for Framework development comprise: an overview of inclusive education development in Serbia through an outline of the institutional and legal framework and the existing resources; a literature review of the research into inclusive education conducted in Serbia between 2008 and 2013, with emphasis on the methodology applied and research results revealing the status of inclusive education in Serbia; good practices from countries with well-established inclusive education practice and regular monitoring practice.

Foundations for Framework Development

The structure of the Framework, as well as the indicators defined therein, are inspired by a number of sources:

a) research inti inclusive education in Serbia since 2009;

b) measures flowing from the legal framework for inclusive education in Serbia;

c) experiences of the Inclusive Education Support Network associates and other experts on the subject and

d) the structure and indicators identified by the comparative analysis of education quality assurance and external evaluation systems of Australia, the Netherlands, New Zealand, Scotland and Wales.

These sources have served as the basis for developing a matrix of monitoring areas and sub-areas at the national, local and school levels and defining input, output/outcome and process parameters. This has provided the basis for systematic multi-layered monitoring of inclusive education at different levels.

A wide range of contents included in the Framework, as well as the need for multiple information sources, is inspired by the review of research studies conducted thus far on inclusive education in Serbia. The comparative analysis has provided the foundations for the formulation of indicators and a strong case for including statistical indicators, as well as indicators and content referring to wellbeing, satisfaction, motivation, expectations, i.e. indicators of the perception of education by children from vulnerable groups.

The existing and nascent monitoring structures in the field of education in Serbia, such as external evaluation, the National Education Council's indicators for monitoring the state of affairs in education and the like, allowed the development of the Framework to take into account the existing standards and envisaged indicators and to com-

plement them with more accurate formulations and clearer references to the required data collection instruments.

The overview of the introduction of inclusive education and of the projects that supported this process suggests that Serbia has sufficient human resources (especially at the level of schools and school authorities, as well as in the civil sector) capable of accomplishing the challenging task of monitoring inclusive education.

Inclusive Education Monitoring Levels

The Framework has been developed for all administration levels− — national, local and school level — and may be applied as a whole or at individual levels. This ensures consistency of information collection and aggregation from lower to higher levels (for data) and vice versa (for policies), even if monitoring is not conducted at all administration levels at the same time. It is particularly important to set up a consistent framework for all administration levels when the data collection and monitoring system is still not operating smoothly and when it can be expected that some of the stakeholders still do not fully understand all aspects of the overall inclusive education system.

This approach enables monitoring national education policy impacts at the municipal and school levels. The logic behind this approach is that education policy set at the national level becomes functional only when lower levels adapt themselves, rearrange their activities and become organised in an adequate, sometimes even creative way, in order to achieve the objectives set at the national level through their overall actions.

On the other hand, this multi-layer approach provides the possibility of regulating the relations between different administration levels regarding data collection as the basis for monitoring the inclusive ed-

ucation policy. The logic of data collection requires that data should be collected at the lowest levels — school, class, individual level; however, the data can only be considered useful for policy monitoring when they are appropriately aggregated at the school level and forwarded to higher administration levels for further analysis. If the school level fails as a data source, valid data will not be available to the municipal and national levels.

Monitoring the Pace of Inclusive Education Policy Implementation

The Framework distinguishes between input, process and output/outcome indicators. This facilitates monitoring the pace of implementing inclusive education and drawing conclusions on the changes introduced, positive aspects of the changes introduced, as well as source(s) of any problems identified, on the basis of monitoring results. The logic behind the said distinction is relevant, especially at the beginning of introduction of inclusive education: the effects of inclusive education (output/outcome indicators, such as the increase of the number of children from marginalised groups who successfully complete higher levels of education) result from a successfully delivered education process (process indicators, such as teachers' high expectations from all pupils/students), which, in turn, can only result from the effect of input variables/indicators (e.g. student scholarships and teacher training). In the first few years of introduction of inclusive education, it is recommended to focus monitoring efforts on input indicators, i.e. to determine whether all envisaged measures have consistently reached the beneficiaries (schools, teachers, children, parents) and then to shift the focus to process indicators (to verify whether the measures are adequately implemented). Monitoring output/outcome indicators, which entails assessing the impact of the introduction of inclusive education, requires some time. This logic corresponds to

the well-known fact that educational reforms yield results in the long term, that any innovation may also initially cause the situation to deteriorate temporarily, and only after all elements have stabilised and there has been enough time for personal and professional adaptation of all stakeholders involved in the reform will the results start to improve. Including this dimension into the Framework facilitates a realistic assessment of the status of inclusive education and targeting the support precisely to where weaknesses are identified. This, at the same time, provides a clear time frame for the expected achievement of the projected outcomes of the educational change brought about by inclusive education.

Target Values and Monitoring Instruments

The Framework also contains the proposed target values for a number of indicators for various time intervals, thus setting development expectations from the inclusive education system. These values are given as an informed estimate and have been set primarily based on the logical analysis and on indirect findings about the status of certain indicators, identified by reviewing national research studies.

For the purpose of monitoring proposed indicators, it is essential to develop monitoring instruments, which can contribute to assessing the presence or development level of the monitored aspect in an empirically sound way. On the basis of the proposed Framework, standardised instruments will be designed for various beneficiaries (e.g. questionnaires for schools, teachers, parents of vulnerable children, for students, as well as observation protocols or check lists). This will enable data comparability across the system and over time, and will reduce the need for additional funding of targeted research

Using the Framework

In designing the Framework, the principal purpose has been to provide a possibility for enhancing inclusive practices and systematic educational policy planning at different levels. The Framework has been developed taking into account the need for its multifunctionality and capability to enable the production of information for the following purposes:

a) development of annual or multiannual national reports on the status of inclusive education on the basis of selected input, process and outcome/output indicators;

b) development of municipal reports on the status of inclusive education;

c) complementing the external school evaluation framework by new indicators;

d) support for the development of school self-evaluation and foundation for staff self-evaluation;

e) various research purposes and meta-analysis of numerous research studies.

It is worth stressing that the use of the same set of indicators and standardised instruments by different stakeholders and for different purposes, amongst other things, ensures conceptual coherence. A common language for various stakeholders who are professionally and/or personally involved in the development and implementation of inclusive education is essential for constructive dialogue.

National Level of Inclusive Education Monitoring

The quality of inclusive education in schools and classes depends to a great extent (albeit not solely) on the overall education system's orientation towards equity and quality, i.e. towards the values and aims of inclusive education. This orientation is, in turn, most commonly expressly offered, promoted or required at the national level. The level of presence and quality of such offer, requirement and support constitutes an "input parameter" of inclusive education at the national level, while the quality of its functioning may be regarded as a "process parameter".

Likewise, the situation of the education system is judged largely (although not solely) on the basis of the indicators aggregated from school inclusive education monitoring reports under the proposed Framework at the national level, which flow from the data collected regularly by national institutions such as the Statistical Office of the Republic of Serbia or the Institute for Education Quality and Evaluation (in the future also data collected through the Education Management Information System) within their respective spheres of competence, or are generated through special surveys carried out on a sample of schools and students. Thus, inclusive education indicators for the country as a whole certainly constitute "output/outcome parameters" at the national level.

In the Framework, input and process indicators are grouped by areas. These areas correspond to the areas that are, as a rule, taken into consideration in the assessment of the fulfilment of any development/strategic aim and are, as a rule, generated at the national level. These are the basic assumptions for the implementation of a development policy, that of inclusive education in this case: the existence of an adequate institutional structure, strategic and legal framework, resources (human and financial), as well as an appropriate modality of reporting and quality assurance. The proposed Framework assesses

the fulfilment of these assumptions through input parameters, and their functioning through process parameters. We are of the view that retaining a recognisable structure, while elaborating it more precisely for the purposes of monitoring inclusive education, may facilitate the easy use of the proposed Framework and support the reporting under the Framework.

In addition to the input and process parameters generated at the national level, the description of inclusive education in the entire country also requires using targeted data generated at the school or municipal level and aggregating them into indicators at the national level. Such indicators would describe: a) how national initiatives are perceived at the school or municipal level, e.g. to what extent teachers are familiar with the legal provisions governing inclusive education (in that case, they would become national process indicators); b) how inclusive education is realised in schools throughout the country, e.g. what is the coverage of children from vulnerable groups by the affirmative action system (in that case, they would represent national output/outcome indicators); and c) what are the effects of inclusive education in the system as a whole, i.e. what are the values and trends of the relevant statistical data that can be collected at the school level, such as dropout, absenteeism, academic performance etc. (they would constitute a separate category of national output/outcome indicators).

The parameters that reflect rounding off the national orientation towards inclusive education and the indicators of progress, stagnation or change of such orientation are classified into two groups in the proposed Framework: those primarily concerned with the sphere of education, i.e. containing the assumptions, activities and results of the education sector, and those evidencing the wider national consensus on the importance of social inclusion (and therefore also inclusive education), which are of an inter-sectoral nature. In addition to education, these are usually the sectors of social protection, health and/or human or minority rights.

The Framework includes three types of output/outcome indicators.

The first type comprises indicators that directly correspond to individual input and process indicators. They are concerned with certain very important areas of inclusive education which justified and warranted "unbundling" an indicator in all three versions. These indicators testify to the efficiency of national-level actions in certain areas of inclusive education.

The second type comprises indicators that represent the common effects of all input and process indicators at the national level and show the overall progress of inclusive education in the country. These indicators are divided into two subsets, the "minimum set" and the "optimum set". Both are generated at the school level and aggregated at the national level.

The third type comprises indicators that reveal the uniformity of inclusive education development among regions, municipalities or schools, as well as the disparities that must be registered in order to draw attention to them and provide support for addressing them.

Local government level

The local government level is the level at which activities aimed at the implementation of laws and bylaws are coordinated, as well as the level at which various measures aimed at regulating inclusive education implementation quality are initiated, funded and carried out. Laws and a range of bylaws govern the local government that have a direct or indirect impact on the development of inclusiveness; among those functions, the key ones are ensuring the conditions for the operation of inter-sectoral committees (ISCs), funding individual support plans and providing resources for vulnerable children to ensure their full participation in educational activities and social integration.

An important aspect of support for the inclusiveness of education provided by the local government level is the facilitation and promotion of inter-institutional cooperation in supporting an individual child or in supporting projects and activities that contribute to inclusiveness. Cooperation between the school, inter-sectoral committee and centre for social work, or between the school and primary health care centre, is an example of linking and coordinating the activities of various stakeholders at the municipal level.

The inclusive education monitoring framework at the municipal level has been designed by applying the same logic in defining the indicators and the modality of data aggregation applied at the national level. The nature of the defined indicators shows that the input and process indicators are predominantly determined by the measures and regulatory mechanisms implemented by the national level, while output/outcome indicators predominantly rely on the inclusiveness quality indicators aggregated from the individual school level. Such logic of data organisation allows comparisons among municipalities by various criteria, taking into consideration their specific characteristics, to identify successful mechanisms and/or share good practice models. Inclusion in education thus becomes not only a topic for reporting and discussion at the level of a specific municipality, but also a mechanism for cross-sectoral cooperation, a mechanism that contributes to education, social protection and health policy making, as well as a mechanism for inter-municipal exchange, cooperation and alignment.

A range of indicators collected by the system at the school level, which are aggregated from schools' inclusive education monitoring reports or collected in different ways at the school level (e.g. by the Statistical Office of the Republic of Serbia or the Institute for Education Quality and Evaluation) and which serve as "output/outcome parameters" at the national level, can, in fact, be aggregated at the municipal level and represent "output/outcome indicators" for the municipal level. They primarily represent quantitative indicators collected at the level of a school or a pupil/student in need of additional support (absenteeism,

academic performance, dropping out, progression). Municipalities can thus be compared by the quality of their work in the area of inclusive education, taking into account confounding variables that affect the "output/outcome indicators", i.e. the desired outcomes of inclusive education. Confounding variables are understood as all those factors that indicate the level of disadvantage of a municipality, in view of the link between socio-economic status and educational achievements, as well as the risk of dropping out among very poor pupils/students from deprived environments (the proportion of the Roma population, low average income, low municipal development index), as well as the factors that may have a positive impact on the outcomes, i.e. "output/outcome parameters" (the number of teaching assistants in the municipality, the number of Roma civil society organisations, the number of Roma coordinators in the municipality). However, in addition to these "output/outcome parameters", it is also possible to design "output/outcome parameters" at the municipal level that would indicate more directly the quality of municipal support provided to schools in implementing inclusive education. These indicators provide an insight into effective and efficient implementation of measures as such at the municipal level and describe how municipal inclusive education support mechanisms function. In addition to describing the status of implementation of inclusive education in a municipality, they can support the identification of the factors leading to success or failure in the implementation of specific support measures.

Other institutions, such as the Statistical Office of the Republic of Serbia, would be involved in collecting data on output/outcome indicators; the Ministry of Education, Science and Technological Development would coordinate the process and specify which data are required by the system, which data pertain to the overall system and which are primarily collected at the school level and aggregated at higher levels, while various civil society organisations or research institutions could engage in assessing the fulfilment of input and process indicators that predominantly require qualitative research

methodology. This provides an insight into what a municipality does when it is viewed as a distinct unit of analysis, what actually happens in the municipality and what are the factors of success and failure of specific education policy measures; in addition, the impact of the municipality on the output/outcome indicators that pertain to the overall education system as a macrosystem is monitored as well.

The output/outcome indicators that facilitate the analysis of the implementation of inclusive education and assessment of the quality of inclusiveness of education in a given municipality are aggregated from the data collected at the school level.

School level

The central position in the Framework is held by the school, which constitutes the basic information source, from which data are aggregated at higher levels. At the school level, indicators are grouped in three areas: characteristics of education work, school ethos and support to education inclusiveness. As the Framework facilitates comparing data from different sources and enables focusing on specific areas, depending on the context and the school's development plan, its potential role in school self-evaluation is significant. Indeed, a school is an institution which has the capacity (staff and procedures) to react flexibly and to change and adapt the focus of its work as it goes along. Continued monitoring enables it to launch a timely and targeted intervention in case of indications of stagnation or negative trends. In addition to indicators geared towards status assessment, the Framework also contains benchmarks modelling smooth functioning of different inclusive education aspects. It is assumed that these benchmarks can inspire reflection and discussion within schools and encourage schools' orientation towards self-development. The

Framework can also serve as a basis for teachers' self-evaluation. By reviewing the indicators contained in the Framework, or – better still – after applying them, a teacher can draw his/her own inferences about the inclusiveness of his/her own teaching practice.

Among the key roles of the Framework is encouraging inter-institutional networking and cooperation, given that the proposed Framework rests on the assumption that the school, however important its contribution may be, is only a link in the chain of institutions, organisations and individuals responsible for advancing and promoting inclusive education. The indicators are, therefore, defined in such a way that presupposes the existence of a network of institutional support to inclusiveness and the purpose of these indicators, in addition to registration and monitoring, is to stimulate inter-institutional networking and cooperation.

The assumption of any improvement of inclusiveness is decision-making that takes into account the context and which is based on facts. The proposed monitoring framework for inclusive education, as well as the selection of inclusiveness indicators, also stimulates development in another way. Adequate administration of instruments presupposes the existence of updated and regulated school records. The culture of recording and systematising data serves the purpose of improving school efficiency in organisational terms and of creating an institutional "memory" that can later be aggregated at various levels and for different periods. This also goes for the development of inclusiveness both at the system level and at the level of each individual school.

The developed monitoring framework for inclusive education is a collage-type document and each of the indicators is accurately described by input characteristics, processes and expected outcomes, operationalized through output/outcome indicators. The individuals/institutions that plan and conduct monitoring of inclusive education,

at any level, can make any selection of indicators that best answers the needs of monitoring and evaluation.

According to their nature, inclusiveness indicators at the school level can be classified in three categories:

Objective measures: based on data and statistical indicators (e.g. the number of students with individual education plans, students' average achievement in school leaving examinations, the share of drop-out students). The majority of inclusiveness indicators belong in this category.

Disposition characteristics at the individual level: psychological constructs for which there are convincing and verified international and national findings speaking about their relevance for the quality and inclusiveness of education (e.g. motivation of students for school learning, self-assessment of social integration). These measures are based on students' (or other stakeholders') self-observation and are expressed as scores in assessment scales.

Professional choices and attitudes: psychological constructs at the level of a school as a community, which describe beliefs and strategies (based on those beliefs) for work with students, shared by the school staff (e.g. high expectations from all students regarding academic achievements, stimulation of students' self-efficiency, differentiation of teaching). These measures may be based on teachers' and other school staff's observations and, in that case, they are typically expressed as scores in assessment scales. In addition, they can also be expressed as descriptive evaluations of the quality of class and school activities, which are formulated by an external evaluator.

In addition to the three areas of school inclusiveness, the Framework also define the area of quality assurance. In terms of its structure and coverage, this indicator transcends the classic definition of qual-

ity assurance, which is mostly based on the fulfilment of acceptable standards of various aspects of education quality. This indicators is a concise compilation of all other instruments and can be used independently, when we need a rapid, yet sufficiently comprehensive overview of the situation. In addition to indicators at the school level, quality assurance also includes those that show the school's link with the local and national levels, i.e. demonstrate the functionality and the degree of implementation of solutions conceived at the system level.

Recommendations on the Use of the Inclusive Education Monitoring Framework

In view of the many potential uses of the Framework, in the initial stages of its application it is worth highlighting some of the most beneficial uses:

Regular reporting on the minimum output/outcome indicators and on the system of basic indicators titled "Quality Assurance" in the Framework. This will ensure the basic benchmarks for the assessment of the overall inclusive education system. These reports should be prepared every two or three years (first time in 2015), at the level of each school, each municipality and, naturally, at the national level. A particular value of these reports should be in their transparency, dissemination to parents and the general public, which can generate attention and joint action for further development of education inclusiveness.

The choice of additional focal areas of inclusive education monitoring, which are of particular importance for a given school, a given municipality or the system as a whole at the national level. For instance, a school may be particularly interested in checking vulnerable students'

motivation, sense of acceptance and their parents' participation, or may wish to assess teachers' inclusive education competencies from different aspects, or to verify whether all necessary support has been provided to vulnerable children. A municipality may be interested in a more in-depth analysis of dropping out, transition from one education level to the next, or may examine the issues of discrimination against and segregation of Roma pupils/students. In both cases, in addition to the minimum package, the school or municipality will use a wider range of indicators to capture the area of specific interest. Further, the national level may be interested in affirmative action success rate, or disparities among municipalities or schools within different school authorities, in order to identify the municipalities and/or schools that require additional support. In addition, this approach is aimed at identifying the municipalities and/or schools that achieve excellent results against some of the indicators, in order to describe their good practices and offer them as models for other schools.

It would be worthwhile to focus on those inclusive education areas that are most rarely monitored, and the proposed Framework has the potential to meet these requirements. A review of the research into inclusive education conducted to date has revealed that, in this respect, the most overlooked areas are cooperation among different stakeholders, policy coherence among different levels of administration, affirmative action, parent participation and pupil/student welfare and satisfaction. The Framework features well designed indicators of the less commonly monitored aspects of inclusive education.

The Framework allows data collection from one type of informants only (in some cases, it may be useful to look into the opinions of parents only, students only, or teachers only, by all indicators), or data collection from all informants on the same question (which enables cross-validation, detection and remedying of misunderstandings or tensions that may occur in the implementation of inclusive education).

It is hoped that, in the future application of the Framework, its coherent structure and the possibility of flexible choice of indicators within that structure – indicators pertaining to a specific administration level of interest, indicators describing a specific area of interest across different levels, or any other combination of indicators in line with users' needs – will prove to be particularly useful.