Towards a Multi-Level, Multi-Stakeholder Quality Assurance, Monitoring and Accountability Framework

Thematic Country Cluster Activities Literature Review

EUROPEAN AGENCY
for Special Needs and Inclusive Education

TOWARDS A MULTI-LEVEL, MULTI-STAKEHOLDER QUALITY ASSURANCE, MONITORING AND ACCOUNTABILITY FRAMEWORK

Thematic Country Cluster Activities
Literature Review

European Agency for Special Needs and Inclusive Education

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INTRODUCTION

From late 2023 onwards, work within the [Multi-Annual Work Programme 2021–2027](#) of the European Agency for Special Needs and Inclusive Education (the Agency) will address Agency member country priorities through Thematic Country Cluster Activities (TCCA). The agreed priorities for the first cycle of TCCA work are:

- Monitoring and evaluation (M&E) of policy implementation for inclusive education

- Supporting collaborative working across sectors, levels and the full range of stakeholders

- Developing multi-level, multi-stakeholder quality assurance, monitoring and accountability frameworks for inclusive education.

By examining the available academic literature around these thematic areas in detail, this literature review aims to support the planning of TCCA collaborative activities. These activities will, in turn, support Agency member countries to engage with implementation issues impacting on inclusive education.

The TCCA work will be tailored to support individual/small-group policy challenges and development needs. It will enable Agency country representatives to work with peers from across Europe to discuss key issues, challenges, strengths and opportunities in their education systems.

Along with information from the Agency's [Country System Mapping](#) reports, this literature review will serve as stimulus material for planning and preparing the first cycle of the country cluster work (2023–2025). It therefore aims to document and discuss recent findings from international and academic literature, focusing on the three inter-connected policy priorities set out above. This review aims to support the further development and implementation of policy and practice for equitable inclusive education within an overarching approach of continuous system improvement.

The following sections of this introduction set out the rationale for the approach and the methodology used for the review.

The review's content will focus on the three priority areas, which are considered to be inter-connected and inter-dependent. This review actively stresses this aspect to ensure coherence and avoid duplication across its main sections.

[Section 1](#) discusses monitoring and evaluation. It reviews the literature on these processes at both school and national levels, focusing on how these quality assurance activities can support effective policy implementation and continuous improvement.

[Section 2](#) explores literature on collaboration and cross-sector working at all system levels as a key factor in implementing inclusive policy. This includes collaboration around schools/communities and within levels of the education ecosystem, as well as between system levels. Crucially, it examines the impact of multi-level governance, collaboration and partnership working on quality assurance and accountability.

In light of the learning from sections 1 and 2, [section 3](#) synthesises the challenges and key issues around developing a multi-level, multi-stakeholder quality assurance framework for

continuous system improvement that also holds key stakeholders to account. This section considers underpinning principles and essential requirements for such work. It is followed by a Conclusion section that presents a draft model for a multi-level, multi-stakeholder quality assurance, monitoring and accountability framework.

Sections 1 and 2 conclude with a synthesis of key issues for further discussion; section 3 draws on these to produce the draft model framework. This aims to support the TCCA activities and the development of an integrated set of policies, activities and procedures that consistently build on each other in a quality assurance cycle to ensure continuous improvement (European Commission, 2015).

Finally, the review includes full references.

A focus on continuous system improvement

As education systems become increasingly complex and governments are under pressure to deliver more efficient and effective services, it is now widely accepted that 'sustained development hinges on good governance and accountability' (UNESCO, 2016, p. 5).

At national level, accountability starts with the primary duty of governments regarding all learners' right to education. Several international and European conventions and communications, to which Agency member countries have committed, set out learner rights both to and within education. These commitments should inform national laws and policies on education that impact on learners' experiences in schools and classrooms.

M&E activities often focus on the school and classroom level, as this is where inclusion is ultimately successfully implemented (Carrington et al., 2017; Schuelka, 2018). This aligns with this review's first priority – M&E of policy implementation for inclusive education. From such activity comes the qualitative and quantitative data (e.g. from school self-review and learner assessments) needed for accountability, school 'quality enhancement' and 'system-level improvement' (Maxwell & Staring, 2018, p. 1). To gather and effectively use such data, teachers and leaders must be supported to increase their capacity and competence in this area.

Using information from the school level, therefore, is primarily focused on improvement with the learner at the centre. Within the context of inclusive education, quality provision involves effective collaboration within schools, between schools and families, and between schools and other agencies in the community that can all contribute to more effective and efficient support for all learners. Collaborative activities also require a policy context that supports and values cross-sector practice and enhances co-operation between, for example, government departments at national level. In line with the second priority above, this review will consider cross-sector collaboration across all education system levels and, in particular, inclusive quality assurance and accountability for all stakeholders that further contribute to school and system improvement.

Linked to the priorities outlined above, previous Agency activities have regularly raised issues around quality assurance and accountability, e.g. Organisation of Provision (2014a), Raising the Achievement of All Learners in Inclusive Education (2017a), Supporting Inclusive School Leadership (2019a) and Key Principles (2021a). In its Country Policy Review and Analysis work (European Agency, 2021b), the Agency found

that policies addressing issues around monitoring and quality assurance (e.g. measures related to school ethos, supporting improvements for schools with lower educational outcomes) were less comprehensive than many other policy areas.

As Ramberg and Watkins state, 'within all countries there are, to differing extents, gaps between policy formulations and the actual realization of inclusive education' (2020, p. 87).

This review therefore aims to synthesise research and support thinking within the TCCA to inform the development of a continuous improvement model that countries can apply in their own contexts and situations. This model will bring together the elements of school-level M&E with policy and practice at regional and national levels in countries. This will inform system and school improvement while also holding key stakeholders to account.

Such a model, presented in [section 3](#) of this review, can only be established when the vision and values for inclusive education are clearly expressed and evidence is gathered and used effectively with stakeholders, to provide information on what works and clear action plans to address issues requiring further attention. Overall, the aim is to ensure a balanced approach to accountability and improvement to enable all learners to benefit from a high-quality, inclusive education.

Balancing accountability and improvement

While the stated aim of this work is to support a continuous improvement model, accountability must also be considered. The European Commission (2015) distinguishes between the functions of accountability and improvement as follows:

- A summative function that holds key school-system stakeholders accountable for their results and ensures that processes comply with regulations. This may include policies and activities to ensure that quality standards and objectives covering different areas of school education (e.g. teaching, learning, learners' assessments, school climate, teacher training, etc.) are met.

- A formative function that focuses on improving practices and results (e.g. recommendations for improvement, action plans, support measures, etc.). This should ensure that any weaknesses identified following summative quality assurance activities or processes are addressed, and that standards and objectives are adapted to emerging needs and challenges, in a continuous improvement cycle.

Important here is to recognise the need for clarity around these functions and ensure that information and data are fit-for-purpose and collected with a clear purpose in mind.

The term 'accountability' (linked to the summative function) is much discussed, with many competing definitions (Ozga, 2020). In education, accountability is widely recognised as a complex and multi-faceted concept (Brill, Grayson, Kuhn & O'Donnell, 2018; Högberg & Lindgren, 2021) where 'typologies of accountability … developed over time reflect changes in governing logics and political agendas in particular contexts' (Skedsmo & Huber, 2019, p. 251).

A high-quality education is in the best interests of every individual and of society. Learners who fail to complete at least secondary school education are more vulnerable to:

> … adverse consequences in adulthood, including a higher likelihood of unemployment, low-wage employment, poor health, and involvement with the criminal justice system. Those adverse adult outcomes for poorly educated individuals have significant costs for the nation as a whole (National Academies of Sciences, Engineering, and Medicine, 2019, pp. 1–2).

As stated above, governments are accountable for their duties under key international and European conventions, such as the United Nations (UN) Convention on the Rights of the Child (1989), UN Convention on the Rights of Persons with Disabilities (2006) and European Union (EU)-level indicators. National accountability therefore starts with ensuring all learners have:

- the right to education – education granted to everyone without discrimination;

- rights in education – learners' rights should be respected within the learning environment and be reflected in curricula, materials and methodologies;

- rights through education – democratic values and respect for human rights should be promoted (Meijer, 2010).

In the context of the increasingly diverse school population, accountability frameworks also need to focus on the system's ability to cope effectively and equitably with the diversity of learner profiles. There should be a balance between:

- *Efficiency* … focusing on the improvement of cost benefit-relationships within systems;

- *Effectiveness* … aiming at better educational outcomes for learners as well as other stakeholders …;

- *Equity* … ensuring equitable educational opportunities through respect for diversity and the elimination of discrimination (Watkins & Ebersold, 2016, p. 231).

The European Commission refers to the above three goals as the 'impossible trinity' (2017, p. 45). However, it also explains that the Organisation for Economic Co-operation and Development (OECD) Programme for International Student Assessment (PISA) surveys 'have consistently found that education systems can combine effective outcomes and high levels of equity' (ibid.). As such, the Commission suggests that efficiency could 'complete the picture' by answering the question: 'can the system provide at least the same levels of effectiveness and equity at a lower cost?' (ibid.). 'Increasing efficiency can be seen as a desirable policy goal only if it does not reduce the effectiveness and/or equity of an education system' (ibid.).

It is difficult to establish causal links between factors that contribute to an efficient, effective and equitable system (UNESCO, 2016). However, the functions of accountability and improvement need to be balanced. Effectiveness and efficiency may align more

closely with accountability when summative information/data is used to hold stakeholders to account. Examining equity and inclusion may require more formative data/information and may remain at the core of the improvement agenda.

To fulfil duties/responsibilities and secure improvement, the UN Educational, Scientific and Cultural Organization (UNESCO) (2017a) notes that a credible education plan with clear targets and lines of responsibility is needed. This aligns developments with the agreed vision of high-quality inclusive education and ensures coherence and consistency across policy and practice at all system levels.

This review will examine positive aspects of quality assurance practice (for example, collaborative practice and broader methods of learner evaluation) and ways to avoid counterproductive negative influences and perverse incentives (such as 'top-down' accountability) (Lingard & Sellar, 2013). It will explore key aspects of M&E to support high-quality inclusive education for all learners, which integrates inclusive accountability as part of a continuous improvement model and achieves Gilbert's (2012) proposed change in mindset. Gilbert (ibid.) recognised the need for accountability to be professionally owned rather than externally imposed, with a greater emphasis on formative accountability as a complement to summative accountability and increased collaboration within and across schools.

For both accountability and improvement purposes, governments (and, in turn, schools) must have a widely agreed vision of what high-quality inclusive education looks like at policy level and in practice in school communities. The following section discusses this.

What is high-quality inclusive education?

How can high-quality education be defined, bearing in mind that the 'highest performing education systems are those that combine equity with quality' (OECD, 2012, p. 3)?

Inclusive education, in particular, is defined in many different ways (Amor et al., 2019; Nilholm & Göransson, 2017). The need for clarity in terminology and communication, and regarding the purpose of any activities linked to quality assurance and accountability, is well-documented (OECD, 2013; 2019a; Downes, Nairz-Wirth & Rusinaitė, 2017; Golden, 2020). As such, it is clearly a priority for countries to agree on what high-quality inclusive education looks like. This will enable stakeholders to collectively agree what they will be held accountable for.

This is reinforced by the Agency's Key Principles work, which states:

> Within legislation and policy, there must be a clear concept of equitable high-quality inclusive education, agreed with stakeholders. This should inform a single legislative and policy framework for all learners, aligned with key international and European-level conventions and communications, as the basis for rights-based practice (European Agency, 2021a, p. 12).

Underpinning this is the establishment of some core values that are the basis of all thinking and practice. The Council Conclusions on Inclusion in Diversity to achieve a High Quality Education For All provide guidance here, underlining:

> … the need for education and training to foster inclusion in diversity to achieve a high quality education for all, while equipping all learners with social, civic and intercultural competences to strengthen, reaffirm and foster the EU's democratic values, fundamental rights, social inclusion and non-discrimination, as well as active citizenship (Council of the European Union, 2017, p. 1).

Haug suggests that the underpinning values have 'links to interactionist ideology and revolve around fellowship, participation, democratization, benefit, equal access, quality, equity and justice' (2017, p. 206).

In recent years, inclusive education has developed:

> … from a single-layered concept, focused on 'mainstreaming' learners with disabilities or special needs into regular schools (UNESCO, 1994), to a multi-layered concept. The latter is concerned with developing equitable quality education systems for all learners by removing barriers to their presence in mainstream schools, full participation in school and community, and achievement of valued goals (including those wider than academic learning) (European Agency, 2022a, p. 58).

It has also involved a move from providing compensatory support to fit learners into existing arrangements, to more flexible environments and teaching approaches that aim to prevent difficulties occurring. The focus here is on learner rights which requires a change in educational culture: from a focus on individual support to remedy 'deficits', to support for 'schools to increase their capacity and capability to respond to the diverse needs of all learners' (ibid., p. 60). This requires well-trained teachers, adequate facilities and learning materials, a relevant curriculum, a good learning environment, and a clear definition and accurate assessment of learning outcomes (UNESCO, 2000). It is underpinned by core values and the active involvement of learners, parents, teachers and the wider community (European Agency, 2018a).

Within the Agency, all member countries have agreed the Agency position on inclusive education systems, which affirms their commitment to the following vision: 'All learners of any age are provided with meaningful, high-quality educational opportunities in their local community, alongside their friends and peers' (European Agency, 2022b, p. 1).

This definition can serve as the basis for dialogue with the full range of stakeholders to set out a vision to guide school and system improvement and ensure fulfilment of the right of all learners to a high-quality inclusive education.

Methodology used in this review

This review includes recent work from international organisations (UNESCO, UNESCO Institute for Statistics (UIS), UN Children's Fund (UNICEF), OECD, World Bank) and European institutions (European Commission, European Parliament, Eurydice, etc.). It also includes peer-reviewed papers from major journals (e.g. *International Journal of Inclusive Education*), as well as books and book chapters by recognised authors in the field.

The evidence examined also includes Agency publications and grey literature, such as theses, organisational reports, conference presentations, survey results, reviews of country policy/practice, guidance materials and online literature. Some recent systematic reviews and meta-analyses were also examined.

Most of the literature collected was found via internet sources using general search engines, such as ERIC and Google Scholar. Searches were also made of websites of key international and European organisations (OECD, UNESCO, World Bank, UNICEF, European Commission, Eurydice).

The literature reviewed was published during 2012–2023, with a few exceptions where research was considered particularly significant. All materials used were available in English.

Different combinations of relevant terms were used as searches, including the following, specifying that content should relate to (inclusive) education and/or equity and inclusion:

- Monitoring and evaluation
- Quality assurance
- Accountability; shared accountability
- Data collection
- Collaboration; cross-sector collaboration; multi-agency collaboration.

A snowball approach (Miles & Huberman, 1994) was adopted to find relevant papers from the lists of references in the key references. Papers were organised according to the priority themes to be explored in the review and to lay the foundations for further work that might support countries in collaborative development of policy and practice in this area.

SECTION 1 – MONITORING AND EVALUATION

Maxwell and Staring (2018) recognise the role played by strong quality assurance systems in ensuring that all learners in schools throughout Europe receive a high-quality education. However, quality needs to be 'continuously monitored and improved' at all education levels (European Commission/EACEA/Eurydice, 2015, p. 3).

UNESCO (2016) recognises that M&E is essential for knowing whether an education sector plan is being implemented, as well as for learning lessons for future policy and planning. M&E, therefore, plays a key role in quality assurance. The OECD (2023) stresses the importance of such processes in assessing progress towards greater equity and inclusion.

As UNESCO (2016) notes, one of the main purposes of M&E is to ensure that high-quality education is being provided to all learners, at all levels. This requires attention to the quality of:

- input (e.g. financial resources, policies, teacher training, curriculum and leadership);
- processes (development of school climate, collaboration, support to individuals);
- outputs and outcomes, including:
    - educational outcomes (e.g. participation, drop-out, grade repetition rates and achievement);
    - well-being outcomes (such as sense of belonging, mental health and school climate);
    - non-educational outcomes (for example, economic and labour market outcomes, and health outcomes) (OECD, 2023).

As the concept of quality in education has become more complex, so measuring it has become more of a challenge. The Agency stressed the need to empower schools to 'focus on the progress and achievement of all learners, and not only on what can easily be measured' (2017a, p. 59).

New quality assurance approaches should therefore 'start from the strengths of schools and school education systems and be developed' from there (European Commission, 2018a, p. 33). There should be an emphasis on providing feedback on policy and practice that will inform improvement (OECD, 2023) and impact on equity and inclusion (Cerna et al., 2021).

This section will examine M&E at school/community and national levels. It will highlight the positive aspects of various processes and points to consider in enabling M&E to contribute to effective policy implementation for inclusive education. Before looking more closely at M&E at different system levels, it is helpful to consider the meaning of these concepts.

What is meant by monitoring and evaluation?

The OECD defines 'monitoring' as follows:

> The process of systematically tracking aspects of education/school implementation, with a view toward data collection, accountability and/or enhancing effectiveness and/or quality (2015a, p. 235).

According to the Agency's online glossary, evaluation is:

> A systematic and objective assessment of an on-going or completed project, programme or policy, its design, implementation and results.

> Evaluation focuses on the macro level, considering the context of learning and related factors. Assessment measures learning at the micro or learner level and is one element of evaluation (European Agency, no date).

Monitoring and evaluation complement each other, forming a continuous process. The process starts with monitoring inputs and outputs and gradually develops into 'a combination of monitoring and evaluation and thereafter increasingly into an evaluation of impact' (UNESCO, 2016, p. 40). What is critical is that M&E processes provide a clear understanding of any changes – positive or negative (ibid.). There is no clear division between monitoring and evaluation. The emphasis throughout is, as stated above, on using findings for planning or policy formulation and continuous system improvement.

What does monitoring and evaluation involve?

An M&E framework should draw on 'a number of different tools and components to collect and organize data needed to monitor a system's performance' (). According to UNESCO, it may involve:

- 'Compliance monitoring', focusing on inputs (compliance with 'standards and norms set by rules and regulations'), mainly focused on teachers, classrooms, books, equipment, etc.

- 'Diagnostic monitoring', focusing on the 'instructional processes relating to what happens in the classroom' and whether learners 'are actually learning what they are supposed to learn'

- 'Performance monitoring', focusing on outputs with emphasis on academic achievement (usually assessed through testing) to see the results of the investment made in education (Richard, 1988 quoted in UNESCO, 2016, p. 11).

Whatever the purpose, all M&E systems should have the following characteristics:

- Intensive use of the information from M&E 'in one or more of the stages of the policy cycle' (e.g. policy review, amendment and/or implementation) and by different stakeholder groups.

- 'Reliable and quality information' that is 'relevant and needs-based'.

- Sustainability, or 'the likelihood of an M&E system surviving and continuing to be operational and efficient in spite of changes in the government or top officials of the concerned department/ministry' (UNESCO, 2016, p. 40).

While policy and practice in M&E will vary widely among countries, the focus at different system levels may include the following:

- At national/regional level, data on learners' access to and participation in education, evidence of long-term outcomes, key policy priorities and concerns regarding equity and inclusion

- At school level, data on quality of school life for all learners and stakeholders e.g. valuing diversity, providing support, parental involvement, community involvement and social inclusion, leadership support for inclusive culture and building inclusive capability

- At classroom level, organisation of learning, use of resources, teacher knowledge, skills, competences and attitudes

- At individual level (teachers and learners), engagement in learning, academic success, personal, social and emotional well-being (adapted from Watkins & Ebersold, 2016).

Education system **evaluation** can inform policy development, curriculum, planning, reporting, resource allocation decisions and performance management. In the context of limited resources, it can be crucial in ensuring value for money (Cerna et al., 2021). Evaluation can also support the identification of policies, programmes and processes that best address the needs of learners, and can help countries to identify small-scale initiatives that can usefully be scaled up (OECD, 2023). The timing of evaluation may vary through the life cycle of a policy or programme. It may focus on process, impact or outcome – or be a summative evaluation of the whole policy or programme cycle.

UNESCO (2016) notes that, in practice, most countries place more importance on monitoring and less on evaluation. However, the OECD Education GPS (2021) notes a growing interest in system evaluation. This stems from a recognition of the need for reliable evidence, a sharper focus on education outcomes and attention to international learner assessments.

As the European Commission notes: 'Ultimately, improvements in student learning and well-being happen at the school level' (2020a, p. 3). The next sections will focus on M&E at different system levels, starting with school level.

Monitoring and evaluation in schools

National and regional policy-makers can support change by 'helping schools to develop a culture of self-reflection and self-evaluation which are fundamental for improving all children's and young people's learning and wellbeing' (European Commission, 2020a, p. 3).

In developing quality assurance and M&E for school development, Looney and Kudelova suggest the following guiding principles:

- **Coherence:** Systems should strive over time to achieve balance and coherence across different mechanisms that have been developed to try to meet the demands and expectations of stakeholders working within schools and in the wider school education system.

- **Trust and shared accountability:** Trust and respect between and among internal and external actors are fundamental for quality assurance and school development.

- **Shared understanding and dialogue:** Quality assurance approaches should support the development of a common language and shared understanding among internal and external actors (2019, p. 3).

Agency work (2017a) also concludes that it is important for countries to draw on multiple measures to monitor both quality and equity of opportunities, outcomes and resources (Cook-Harvey & Stosich, 2016). Moreover, it is important for local communities and schools to develop measures to reflect their own contexts and all aspects of their practice.

Maxwell and Staring (2018) set out six main aspects of policy and practice in schools:

- School self-evaluation
- External evaluation
- Evaluation and appraisal of teachers and school leaders
- Use of national qualifications and examinations in upper-secondary education
- Assessment of learner progress at earlier stages
- Stakeholder involvement.

These practices are highly inter-dependent and need to be considered together as part of a coherent quality assurance strategy. This strategy must be reliable, transparent and valid, based on a 'balanced understanding of learner development' (ibid., p. 6) covering the full range of competences.

These practices will be examined below, starting with school self-evaluation. The sixth practice – involving all stakeholders – plays a significant role and this section will briefly consider it. Section 2 of this review, which focuses on collaboration, will examine it in more depth.

Schuelka observes that all the primary literature sources (e.g. Booth & Ainscow, 2011; SWIFT Education Center, 2018; UNESCO International Bureau of Education, 2016) suggest that the first step is to 'help schools understand their own challenges, assets, resources, value frameworks, stakeholders, and where to locate data and evidence' (Schuelka, 2018, p. 8).

A self-evaluation process can play a key role, particularly when supported by the use of frameworks such as the *Index for Inclusion* (Booth & Ainscow, 2011) and tools offered by UNESCO (2017b) and the Agency, e.g. *Inclusive Early Childhood Education Environment*

Self-Reflection Tool (2017b), *Raising the Achievement of All Learners: A Resource to Support Self-Review* (2017c). These tools define 'success' in inclusive education, setting out 'criteria for continuous evaluation and critical examination of education systems' (Schuelka, 2018, p. 4).

While such tools attempt to 'measure' inclusive education, they also have an improvement function. This is particularly the case when the tools support self-evaluation as 'a basis for shared, critical reflection on practice and contribute to aspirational improvement plans, leading to school and system improvement' (European Agency, 2017c, p. 5).

The following sections examine the six aspects of policy and practice set out by Maxwell and Staring (2018): school self-evaluation; external evaluation; appraisal of teachers and school leaders; national assessments; assessment by teachers; and stakeholder involvement.

School self-evaluation

Maxwell and Staring recognise that:

> The widespread growth of school self-evaluation across Europe reflects a growing acceptance amongst Member States of the merits of embedding a strong primary responsibility for quality assurance and continuous improvement at the 'front line' [built on trust] rather than seeking to impose quality primarily through 'top down' mechanisms of prescription and regulation (2018, p. 9).

European Commission/EACEA/Eurydice (2015) found that 27 of the 31 education systems studied used internal evaluation. Some countries used the same framework for both internal and external evaluation, while others had developed a specific self-evaluation framework. The most common areas covered by school self-evaluation are learner performance, quality of instruction, learner satisfaction, and compliance with rules and regulations. The participants varied from school staff only, to the full range of stakeholders in and around schools. Some countries published the outcomes of self-evaluation, while others used results to produce a strategic document setting out measures for improvement.

Research indicates that school self-evaluation can positively affect school improvement (McNamara, Skerritt, O'Hara, O'Brien & Brown, 2021; Schildkamp, Vanhoof, van Petegem & Visscher, 2012) and improve outcomes for learners (Caputo & Rastelli, 2014; Antoniou, Myburgh-Louw & Gronn, 2016). The many potential benefits include developing shared understandings of key ideas and a sense of ownership and self-determination in those taking part. Stakeholder involvement in school self-evaluation is crucial. In particular, it is vital to ensure that all groups are represented and all voices heard, including those of disadvantaged groups.

O'Brien, McNamara, O'Hara, Brown and Skerritt (2022) refer to the work of van der Bij, Geijsel and ten Dam (2016), who note that certain conditions are necessary for successful self-evaluation. These conditions include:

- developing 'a cyclical approach';

- introducing user-friendly instruments and procedures;

- using standards;

- harmonising self-evaluation with the inspection framework;

- ensuring 'relevance for stakeholders';

- having access to external support;

- enabling participants to perceive the process as transparent;

- encouraging ownership of the self-evaluation process with a positive 'impact on school culture' (O'Brien et al., 2022, p. 2).

Importantly, schools need support to engage in effective self-evaluation. This might include financial support, training, guidelines, specialist advice and the provision of frameworks and indicators (European Commission/EACEA/Eurydice, 2015). It is also critical that the school climate and relationships are supportive and encourage stakeholders to see self-evaluation as an improvement process rather than as a requirement linked to school inspection (Hopkins et al., 2016). In a high-stakes, high-pressure culture, attributing blame can negatively affect both equity and learning (UNESCO, 2017b).

O'Brien et al. (2022) suggest that policy-makers promoting school self-evaluation (SSE) as a key school improvement process have a responsibility to ensure that related professional development provided is fit for purpose. They conclude that:

> SSE is a means to an end, improving outcomes for students, and as such those who develop and support SSE processes should consider the most efficient and straightforward process that would assist schools to identify, and more importantly undertake actions that would lead to such improved outcomes (ibid., p. 13).

In 'improvement-focused' self-evaluation, schools should consider processes as well as learner outcomes, ensuring that learners' rights within education are met. Watkins and Ebersold (2016), based on earlier Agency work (2011), agree that monitoring the implementation of learners' rights is crucial. They highlight the need for information on the areas shown in Table 1.

Table 1. Monitoring learner rights

Monitoring	Focus
Access to and participation in educational opportunities	Access (being there) Collaboration (learning together) Diversity (recognition and acceptance).
Access to support and accommodation and equitable learning opportunities	Monitoring school development through an 'inclusive lens', focusing on equitable opportunities across all school structures and processes (European Agency, 2017a) Attention to a continuum of support with 'more accessible curriculum and assessment frameworks' and 'greater flexibility in pedagogy, school organisation and resource allocation' (European Agency, 2014a, p. 23).
Learning success and transition issues: coherent pathways and early support to prevent early school leaving and raise achievement	Information on 'learning success' beyond academic achievement (including social, emotional, creative and physical learning that engages learners) (Florian, Rouse & Black-Hawkins, 2011) Opportunities for higher education and employment (European Agency, 2018b) Transitions between levels and types of schooling (European Agency, 2019b).
Affiliation opportunities	Opportunities to improve 'belonging' through interaction and participation, such as: • access to public goods and services; • experience of valued and expected social roles of the individual's choice based on age, gender and culture; • being recognised as a competent individual, trusted to perform social roles in the community; • belonging to a social network, receiving and contributing support (Cobigo, Ouelette-Kuntz, Lysaght & Martin, 2012, p. 82).

Information and data on these areas will contribute to monitoring learners' rights in line with EU and international indicators ensuring that 'every learner matters and matters equally' (UNESCO, 2017b, p. 12). It will require a shared, long-term vision of the aims of education, a well-designed framework and coherence with broader education policies. It will also require the development of motivation and capacity of all actors to process data

to 'create a holistic picture of school and student performance and develop clear strategies for school development' (European Commission, 2020a, p. 2).

All the above will also need strong school leadership. Agency work on inclusive school leadership recognised that school leaders need skills in monitoring the progress of school development, self-review and evaluation (European Agency, 2019a). They must use data to analyse progress towards the desired vision and then plan and design appropriate improvement strategies, to impact positively on learner outcomes (DELECA project, 2015).

In summary, Maxwell and Staring (2018) synthesise the actions EU member states have taken to achieve a balance between strengthening school self-evaluation and continuing to empower schools. These include:

- Developing a national set of quality indicators for schools to select from as they undertake their own self-evaluation, preferably the same indicators which will be used by external reviewers or inspectors;

- Providing training for practitioners on self-evaluation techniques, including how to generate, analyse and interpret data, and techniques for action research and improvement projects;

- Encouraging peer review activity whereby schools join in self-evaluation activity in other schools or undertake collaborative review and improvement activity in pairs or groups; and

- Providing schools with relevant 'benchmark' data derived from national collections of attainment and other data, which enable the school to see how their own development and outcomes compare to other schools, including more specific benchmarking against other schools serving learners in similar socio-economic circumstances (ibid., p. 10).

Despite all the positives associated with school self-evaluation outlined here, it is clear that such activity needs to be a true reflection of the school. As Maxwell and Staring observe, 'there is little merit in self-evaluation activity which is misleading or inaccurate and, at worst, simply becomes a process of "self-delusion" (whether positive or negative)' (2018, p. 9). It has, therefore, become common practice to combine school self-evaluation with other sources of evidence, such as external inspection and learner attainment and achievement results. These will be explored below.

External evaluation

The OECD (2015b) found that school inspection forms part of the school accountability system in 30 OECD countries with available data. Inspection practices vary widely across countries. A key focus is often around compliance with regulations. Although a common goal is holding schools to account for use of public resources, financial management appears to feature less frequently in inspection frameworks.

For external evaluation, as with all evaluation, the purpose should be clear to all personnel involved. Data/information should be drawn from several different sources, with some

flexibility to adapt to different contexts. External evaluation arrangements can broadly be seen as serving three main purposes:

- Providing public assurance and accountability;

- Providing an evidential basis for professional advice to inform the development of national policy; and

- Acting as a mechanism for the spread of 'best practice' across the system (Maxwell & Staring, 2018, p. 12).

However, the way any external review body or inspectorate works will inevitably be influenced by the political leadership and culture and how they 'drive' change to the education system (ibid.). As will be discussed below, this can lead to tensions between the accountability and school improvement functions. A focus on accountability may include:

> … incentives to encourage teachers to pay attention to central performance standards and focus on the need to help all students succeed. At the same time, a focus on improvement ensures that data are used to identify needs and adjust school strategies (European Commission, 2017, p. 51).

In most European countries (27 out of 31 examined in the study), a central inspectorate undertakes school evaluation, usually every two to four years (European Commission/EACEA/Eurydice, 2015). Most commonly, inspections draw on standardised criteria in a central framework (ibid.). In addition to compliance, this framework usually includes a focus on educational and management tasks and learner outcomes, together with standards that define a 'good' school. In a smaller number of countries, criteria provide more flexibility with greater autonomy for those completing the inspection.

During their study, European Commission/EACEA/Eurydice noted two different approaches to external evaluation/inspection:

- A 'risk-based approach' with a focus on schools that do not perform to expected standards. This has the advantage of using resources where they are most needed. However, it can be perceived as negative as the emphasis is on identifying weakness, rather than highlighting good practice.
- A 'profile-raising' approach, which raises the visibility of good practice and shares what works (2015, p. 9).

Greany (2015) noted that the inspection system can clarify expectations and incentivise self-evaluation by schools. However, the disadvantages of a high-stakes accountability regime are well known: such practices can reduce freedom and autonomy to innovate (Dunford, Hill, Parish & Sandals, 2013; European Agency, 2017a) and lead schools to teach to the test and 'second guess' what they think the inspectorate wants to see (rather than looking at the evidence base). The publication of school evaluations may raise the stakes further, making such practices more likely.

Inspection in a high-stakes accountability culture is also likely to:

- 'operate fixed and relatively frequent cycles of inspection to provide a regular source of standardised comparative gradings on every provider designed to inform consumer choice';

- 'impact on the style and climate in which inspections take place' (leading to poor ownership and reduced commitment rather than improvement);

- prioritise 'a limited range of hard data' in arriving at judgements and use a standardised methodology to justify decisions (Maxwell & Staring, 2018, p. 13).

On the other hand, inspectorates focused on promoting 'improvement' are likely to 'serve a public assurance role, moderating the quality of school' (and sometimes local area) self-evaluation, on a more flexible cycle (ibid.).

Inspection to promote improvement may be less standardised, to:

> … provide room for innovative approaches that may not fit within typical measures, and/or the softer, less-quantifiable goals for learning, such as measures related to the well-being of all in the school community (European Commission, 2018a, p. 12).

More flexible practice also enables those inspecting to provide a more 'individualised narrative' about each school and release fewer (or no) gradings into the public domain. External evaluators may also build 'professional dialogue' into the process (coaching rather than examining) to help schools learn from inspectors who may have wide experience of practice elsewhere (Maxwell & Staring, 2018, p. 13).

Guidance or 'reference frames' for inspection may be developed centrally or locally, but should involve a range of stakeholders and take account of individual priorities as well as role-specific and context-specific elements (European Commission, 2018b). Stakeholder surveys may be used to gather a range of perspectives in harder-to-measure areas, such as psychological, physical, social and material well-being, effectively broadening the evidence on learner outcomes beyond academic areas (OECD, 2023). Representative sample-based surveys can be used to limit the administrative costs of a full-population study, although a small sample size may limit the analysis of data on learner sub-groups.

Alongside surveys, awareness-raising campaigns may be needed to explain the importance of participation in school evaluation by learners, parents, teachers and other stakeholders. Results of wider consultations should be available to schools so that they can reflect on them in their local contexts and use them for improvement (European Commission, 2020a). All arrangements should identify and address underperformance but within a culture of quality enhancement and trust that is credible to all stakeholders (Maxwell & Staring, 2018). Crucially, such a culture will support teachers and school leaders to provide high-quality inclusive learning opportunities for everyone in the school community.

In summary, external evaluation/school inspection can be a supportive process that can empower schools and support improvement, particularly when linked to school self-evaluation. Care must be taken with regard to high-stakes measures to develop a system 'where quality and equality are not in tension' (Budginaitė, Siarova, Sternadel, Mackonytė

& Spurga, 2016, p. 63) and where school leaders and teachers are supported to further develop their competences. Here, the appraisal process may have a role to play.

Evaluation and appraisal of teachers and school leaders

Many countries are 'moving away from quality assurance as a "control" to more open and "trust-based" approaches' (European Commission, 2017, p. 51). Some of the issues associated with high-stakes external evaluations have been discussed above. The European Commission suggests that 'publishing a range of data on school and teacher performance' may 'help to lower stakes associated with a single, high-visibility assessment or school evaluation' (ibid.). However, sensitivity is required to ensure that the process is not seen as punitive.

It has been recognised for some time that the variability in the quality of the education that learners receive is often greater within schools than between different schools (OECD, 2004; 2013). This is due, at least in part, to differences in professional practice. This reinforces teacher and leader performance as a necessary area for quality assurance. Most countries have moved from a 'hands off' approach (leaving management of such issues to schools) and started to develop more systematic and consistent approaches (Maxwell & Staring, 2018, p. 17).

If well designed, teacher appraisal and feedback systems can increase teacher effectiveness and achieve better learning outcomes (OECD, 2013). The European Commission (2018b) recognises the potential of such processes. It notes they can enhance a teacher's sense of professionalism and engagement, lead to increases in salary or other rewards, and develop new competences which, in turn, may lead to new roles and responsibilities.

Some countries have developed frameworks of design principles or standards for teachers and leaders to increase consistency of practice. Others have established independent regulatory bodies for the teaching profession to support implementation of standards, etc. Importantly, with a focus on improvement, quality assurance and M&E should be linked to high-quality professional development opportunities (Maxwell & Staring, 2018).

As school leaders most often undertake teacher appraisal activity, it follows that they themselves should be subject to quality assurance processes.

The OECD (2015b) writes that policy-makers have become increasingly aware of the significance of school leadership for effective teaching and learning. It suggests that the appraisal of school leaders can be helpful in communicating a vision of effective leadership and improving school leaders' practice.

In the context of decentralisation, school leaders may have autonomy to make decisions about school direction and organisation that impact on equity and inclusion. It is essential, therefore, that leadership accountability mechanisms are aligned with other policies to support inclusion (UNESCO, 2020).

Work by the Agency (2020a) includes a policy framework to support inclusive school leadership. It sets out guiding principles, including a rights-based approach to support equity, a focus on improvement towards an inclusive education system, synergy between policy and inclusive school leadership practice, and a balance between the three key policy levers of access, autonomy and accountability.

Crucial in the context of this review is the focus on improvement towards an inclusive education system in which school leaders:

> … build a culture and implement practice in which all learners are provided with meaningful, high-quality education, high expectations for their achievement, well-being and a sense of belonging within an equitable school environment (European Agency, 2020a, p. 16).

Alongside self-review, external evaluation and staff appraisal discussed above, schools use data from national learner assessments (qualifications and examinations), as well as teacher assessment in school, to consider learner outcomes and the extent to which the school provides high-quality and equitable education for all learners. This is discussed below.

National learner assessments

National learner assessments (usually externally set and marked) are often used with school self- and external evaluation and staff appraisal. These are an important source of data on student learning. However, depending on how the assessment data is used, it can have unintended consequences, with negative implications for equity and inclusion in education (Torres, 2021).

The European Commission points out that relying on a 'limited number of high-visibility evaluations and assessments, and government- or media-generated "league tables"' (2017, p. 51) may increase the stakes for schools.

The potential impact of high-stakes practices was mentioned in relation to school self-evaluation. Here, too, UNESCO outlines some disadvantages of high-stakes assessment, saying that it can lead to the adoption of negative practices, such as 'strict discipline policies, student reassignment and greater focus and time given to those most likely to succeed' (2020, p. 130). Schools may also introduce selective admission criteria, which can change the socio-economic nature of their intake and manipulate exam performance figures (Waldegrave & Simons, 2014; Maxwell & Staring, 2018).

Social segregation among schools may increase if parents choose to enrol their children in schools perceived to be better performing (Davis, Bhatt & Schwarz, 2015). Difficulties may also arise with the creation of league tables, as 'low-performing schools' may struggle to recruit and retain teachers (Clotfelter, Ladd, Vigdor & Diaz, 2004).

The Agency's Raising the Achievement of All Learners in Inclusive Education project (2017a) showed that standardisation and a strong academic focus are still dominant in many countries. This approach poses significant challenges in diverse classrooms, as it may limit learning opportunities and negatively affect vulnerable learners. Moreover, in some countries, the examination system has led to a narrowing of the curriculum, with the risk of some subjects being marginalised. A further issue includes the narrowing of subject experience through teaching to exam or test syllabi.

> Teaching to the standardized content requirements of a learning assessment can make it more difficult for teachers to adapt their work, for instance to reflect students' cultural backgrounds (UNESCO, 2020, p. 149).

Another challenge concerns learners with special educational needs/disabilities who may be disadvantaged by the lack of adjustments that allow them to participate in examinations (European Agency, 2017a). Depending on the stage of education, these issues may affect learners' ability to gain entry to the next stage of learning, including further/higher education and/or employment (OECD, 2023).

Participation may be improved by using access arrangements – for example, papers in Braille, provision of a sign language interpreter, use of computer-based assessments or extra time (European Education and Culture Executive Agency, Eurydice, 2009; Hellebrandt et al., 2020). Nevertheless, the exclusion of learners from assessments may also lead to limited data on their progress at national (or sub-national) level (OECD, 2023). This may then distort the data used to establish the existence – or not – of equitable opportunities for vulnerable and minority groups and reduce opportunities to improve awareness of the main challenges in the education system for particular learners (OECD, 2020).

The European Commission (2020a) suggests that information would better serve school improvement if, for example, representative samples of learners (rather than every individual) were assessed to track national trends.

Maxwell and Staring note that the risk of high-stakes assessment can be mitigated by:

- embedding 'generic, higher-order skills' into subject assessments and certifying wider areas of learning beyond the traditional academic curriculum, with innovative assessments that capture more complex learning outcomes;

- giving importance to key competences in analysis and presentation of results;

- considering data alongside other evidence e.g. reports from national inspection and evaluation agencies that examine difficult-to-measure aspects, such as creativity;

- involving learners, employers and the wider community in defining learning outcomes and assessment methods to ensure relevance (2018, pp. 21–22).

Focusing on equity, positive correlations were seen between equity in education and using learner assessments to:

- inform parents about progress;

- identify aspects of instruction or the curriculum that could be improved;

- seek feedback from learners and have regular consultations on school improvement.

In short, it is necessary to ensure that initiatives do not conflict or produce effects that could obstruct the development of more inclusive schools (Hardy & Woodcock, 2015; Kreitz-Sandberg, 2015). An emphasis on teacher assessment, used alongside the other practices discussed above, may help to address some of these issues. This is explored below.

Assessment by teachers

If data is not used to support improvement, the potential negatives of standardised and formal tests that teachers use to assess learners are the same as those outlined above. Where data focuses on a narrow range of subjects/curriculum content, it can run 'counter to the promotion of a balanced understanding of learner development' (Maxwell & Staring, 2018, p. 24).

However, schools can carry out assessment in line with national standards or benchmarks for learner attainment, recognising that formative teacher assessment (or assessment for learning) and feedback are the best way to promote achievement, as they put the learner at the centre of the assessment process (European Agency, 2016a).

Regarding assessment, policy-makers should 'recognise and address the potentially competing functions of formative and summative assessment and develop a fit-for-purpose integrated system of assessment' (European Agency, 2017a, p. 47). This will require support for teachers and leaders to enhance the quality and consistency of teacher assessment – for example, through moderation by groups of teachers and/or guidance containing examples of learners' assessed work. Such practice can be a valuable form of professional development.

Professional development should also increase schools' capacity to understand and use data for:

- identifying barriers to learning;
- allocating resources and eligibility for support;
- planning/adapting curriculum and pedagogy;
- 'monitoring learner progress and informing teaching and learning';
- monitoring and evaluating 'quality and cost effectiveness of systems and provision and using information to plan for improvement';
- 'holding various stakeholders accountable' (Kefallinou & Donnelly, 2016, p. 210).

Kefallinou and Donnelly (2016) set out indicators for inclusive assessment. However, they particularly stress the need to be clear about the purpose of assessment and appropriately use information from formative and summative assessment to build schools' capability to include all learners. Inclusive practice requires all stakeholders to work together (European Agency, 2017a). The OECD (2023) refers to the benefit of multiple voices across all partner groups contributing perspectives that can shape the way forward with greater confidence.

Stakeholder involvement

Local community-level stakeholders are clearly crucial to achieving an effective school system (European Commission, 2018c). While section 2, on collaboration, covers this topic in more depth, it will be briefly discussed here as the sixth aspect of policy and practice set out by Maxwell and Staring (2018).

The European Commission (2018c) recognises the value of networks between schools and with local and wider communities in supporting collective engagement, building social and intellectual capital and initiating synergies across school systems.

The OECD (2022a) recommends using peers/colleagues in school-to-school support, co-ordinated by a strong middle tier of governance that clearly defines responsibilities at different levels to ensure coherence. Crucially, wider stakeholders in this middle tier may support school leaders to act upon a shared vision and help to bridge the potential gap between central authorities and schools. Working through such networks rather than hierarchies can support 'interdependence rather than power relationships; negotiation rather than control; and enablement rather than management' (Ferguson, 2009, p. 2).

The OECD (2022a) draws on research by Mourshed, Chijioke and Barber (2010), which found that the 'mediating layer' plays a critical role in school improvement. It provides integration and mediation, targets support, interprets and communicates improvement objectives to manage resistance to change, and enhances collaborative exchange between schools. Local area or municipality staff also play a key role in facilitating support networks which may include stakeholders from sectors beyond education (e.g. health, social policy), as well as civil society organisations.

Maxwell and Staring talk more specifically about engaging stakeholders in the quality assurance process, saying that it:

> ... helps build mutual trust and transparency at every level in the system, between individual schools and their local stakeholders, and between national government and the public at large (2018, p. 26).

As such, it is an important strand of policy development.

The OECD (2022b) recognises that stakeholder engagement can depend, at least in part, on the relevance of indicators. These should enable stakeholders to act to produce the desired change, assessing progress and making mid-course corrections for policy and practice when needed. To ensure the relevance of indicators, the OECD suggests organising 'consultation on the selection and prioritisation of indicators' and 'channelling feedback to understand' whether existing data adequately represents reality (ibid., p. 3).

Schools can also benefit from local/regional links with researchers, for example from universities. The OECD (2023) found that school evaluation results do not always reach the school/classroom level. Barriers between researchers and school staff (due to resistance from schools, lack of capacity or poor communication by evaluators) can hinder M&E (Fresno, Lajčáková, Szira, Mačáková, Karoly & Rossi, 2019) and subsequently limit implementation and improvement (Ehren, Altrichter, McNamara & O'Hara, 2013). Schneider and Gottlieb (2021) similarly suggest that creating local-level forums can foster procedural transparency and allow for broader community input into decision-making.

To conclude the discussion on M&E at school and local level, it seems that this is where the impact of policy implementation for inclusive education is most apparent. However, a holistic view of the education system demands consideration of the processes that operate at national (and international) level and that influence the policy context in which schools work. The next section explores M&E at national level.

Monitoring and evaluation at national level

Effective policy-making in education requires information on whether governments are doing things right and whether the desired results are being achieved, meeting the needs of all learners. Strong M&E systems:

> … provide the means to compile and integrate all the necessary information into the policy cycle, thus providing the basis for enabling sound governance and accountability in education policies (UNESCO, 2016, p. 23).

Many governments have committed to international conventions (e.g. UN Convention on the Rights of the Child, UN Convention on the Rights of Persons with Disabilities) that set out the right of all learners to quality, inclusive education. However, the necessary provisions are not always integrated into national laws to ensure that all learners' rights are fulfilled (UNESCO, Network of Education Policy Centers and European Agency, 2021). Focused monitoring and quality assurance processes are needed to ensure that governments – the primary duty-bearers of the right to education (UNESCO, 2017a) – fulfil their obligations, ensuring that all learners have access to high-quality inclusive education.

National governments also need to ensure alignment between indicators used at EU and international levels and country system requirements. These may include, for example:

- European indicators regarding basic skills, early school leaving and exclusion, which also coincide with Sustainable Development Goal (SDG) 4 requirements;
- OECD indicators on access, participation and progress, resources, teaching workforce and learning environment;
- data from international learner assessments.

In a report for the European Parliament, Halász (2016) recommends strengthening synergies between national educational evaluation systems and the implementation of common European policy priorities in education. In particular, the division of work can enable a more efficient sharing of resources as data collection costs have significantly increased.

The subject of 'measuring' education – and especially inclusive education and equity – has been extensively discussed and can present particular challenges. To follow, evaluate and assess inclusive education at all system levels, reliable data on key aspects of inclusive education is crucial (European Agency, 2014a). The National Academies of Sciences, Engineering, and Medicine describe the 'challenge of monitoring disparities in educational achievement and opportunities' as a 'complex regulatory problem', where it is necessary to distinguish 'between the good and the problematic in a system that powerfully shapes socioeconomic opportunity, outcomes, and mobility' (2019, p. ix).

Studies have tended to focus on specific elements rather than on a more holistic view of the system (Saito & van Cappelle, 2010). Most 'measures' remain focused on learners' academic achievement, rather than undertaking the more difficult task of gathering data outside traditional domains. Other studies have focused on characteristics of the learning environment (Ross, Paviot & Jürgens Genevois, 2006; Saito, 2008) and other aspects of education that are more easily measured, which can conflict with the move to more

inclusive systems. Schuelka, however, notes that 'the current thinking is to move beyond measuring and accounting for simply just barriers to access, and offer more of a systems thinking approach' (2018, p. 5).

As 'the governance of education systems becomes more complex, and as more actors and stakeholders (students, teachers and managers, politicians, interest groups, researchers etc.) are involved', more sources of information are combined from different times, with different levels of aggregation and different methodologies (Berendt, Littlejohn, Kern, Mitros, Shacklock & Blakemore, 2017, p. 8). This increasing complexity inevitably presents challenges.

UNESCO notes 'three significant shifts in the development of M&E systems' that 'have taken place either concurrently or independently depending on the socio-economic and political contexts of different countries' (2016, p. 17). These include a shift from:

- 'a simple compliance-based to a more performance-based M&E';

- 'a programme-level orientation to a more holistically-oriented level for M&E';

- 'a centralized focus to a more decentralized focus in the M&E system' (ibid., pp. 17–18).

These changes may be interrelated but have had a significant influence on the development, structure and implementation of information systems. In particular, as many countries have moved towards a more decentralised education system, demand for evidence has grown (UNESCO, 2016). Although autonomy can increase local ownership and better meet local needs and preferences, under-resourcing can lead to a 'failure to develop local capacity', with an impact on inequality (UNESCO, 2020, p. 96).

The following sections examine some key areas of policy and practice in M&E at national level. These are:

- Learner outcomes, including academic and broader well-being outcomes relevant to progress and achievement

- Diversity, equity and inclusion and the dilemma of labelling learners

- Learner presence, placement and participation

- Policy development and implementation.

Learner outcomes (progress and achievement)

Education systems are now placing a stronger focus on measuring learner outcomes. International learner assessments, such as the Programme for International Student Assessment (PISA), the Progress in International Reading Literacy Study (PIRLS) and the Trends in International Mathematics and Science Study (TIMSS), can provide information for policy-makers and other stakeholders on how learners in their country compare with others. They illustrate a focus on academic areas and have influenced countries' practice in national assessments and led to changes in national accountability systems (Brill et al., 2018). The results may also be used to motivate and shape national policies (e.g. curriculum) to improve system-level outcomes. However, as discussed above, policy-makers need to avoid such assessments narrowing national education goals (European Commission, 2020a).

Johansson notes that international large-scale assessments are useful as a 'measure of the achievement trend within countries, particularly for countries with long-standing participation records' (2016, p. 145). Högberg and Lindgren recognise that the power of comparative education is in 'innovative analytical approaches to large-scale assessment data' that can 'raise questions and challenge accepted ideas and widely held policy assumptions' (2021, p. 317).

Such developments are underway with, for example, the merging of PISA data with Teaching and Learning International Survey (TALIS) data, providing additional teacher- and school-level information for examining a broader set of research questions (Gil-Izquierdo & Cordero, 2018). These links, along with new 'measures' for learner well-being, financial literacy and social engagement, will allow more 'diverse research hypotheses to be explored' (Hernández-Torrano & Courtney, 2021, p. 29) and move away from pressure to create more 'homogenised' education systems as countries 'borrow' policies and try to move up the rankings (Johansson, 2016).

The introduction of national standardised assessments in many countries reflects this focus. Data on learning outcomes provides a picture of the extent to which learning objectives are being achieved. These assessments also provide an opportunity to compare learning outcomes across individual schools and regions of the country and over time. For M&E purposes, data on learner outcomes may be complemented by demographic, administrative and contextual data collected from individual schools (OECD, 2013). This includes data from school inspections, appraisals and other aspects of school policy and practice, as discussed above.

Comprehensive school and learner information, including learner outcomes and the impact of education on learners (longer-term destinations, such as higher education and employment), is needed to provide a clear 'picture of the value of investments made and on the impact on policy decisions' (UNESCO, 2016, p. 21).

COVID-19 disrupted the reporting of national examinations and assessments in 2020/2021. Many countries revised the content, format and mode of delivery or cancelled examinations in favour of alternative (lower-stakes) approaches, such as teacher-assessed grades. This gave rise to debates about alternative assessments or validations of learning, such as appraisals of student learning portfolios showing progress over a specific period (OECD, 2022c).

Across OECD countries, there has also been recognition of the importance of social benefits and measures of social well-being. Building on this, a new indicator in OECD Education at a Glance looks at a range of potential social outcomes of education, following the topics defined by the OECD well-being framework (OECD, 2022c).

The inclusion of multiple types of data gathered over time is important to 'develop a well-rounded picture of system and school development. Qualitative data can give added meaning to quantitative data and support broader stakeholder understanding' (European Commission, 2017, p. 54).

Maxwell and Staring (2018) similarly recognise the need for countries to move away from an emphasis on single measures. In particular, they discuss the potential negative impact

of publishing examination/test results. They note that two main methods have emerged to promote fairer comparison of school results:

1. Value-added analysis, which adjusts for learners' prior attainment levels and so measures distance travelled.

2. Benchmarking results against similar schools (e.g. with a similar socio-economic profile). This can be achieved by putting together a comparator group, 'banding' schools or creating a 'virtual comparator' school.

While national systems may vary overall, they need to ensure that the pressure to align practice to identified standards and/or to achieve certain outcomes does not undermine professional accountability (European Agency, 2017a).

In using national data for improvement, some countries have developed digital resources for value-added and contextually-adjusted benchmarking and wider data. This data can be considered alongside examination data, e.g. school attendance, exclusion, etc., to provide a more complete picture of school performance. This review will now consider the use of school data at national level.

School input to national data

Clearly, schools continue to play a key role in information analysis at national level. The OECD (2023) notes the need for effective two-way communication between schools and national-level authorities, recognising that schools do not always receive a statistical analysis of their profile to support them in their internal analysis and further planning. Ainscow, Dyson, Hopwood and Thomson stress that schools need such information to 'scrutinise and ask questions together as to their significance, bringing their detailed experiences and knowledge to bear on the process of interpretation' (2016, p. 29).

Any central monitoring strategy should include the indicators used to regularly monitor performance at school level, so that:

> … teachers, school leaders, and local authorities are more likely to engage, create meaning around national indicators from a school perspective, and ultimately take action according to the objectives of the strategy (OECD, 2022b, p. 3).

If indicators are only monitored at national and regional level at the end of the year, there is likely to be little engagement from local school communities.

Crucially, countries should pay attention to collecting data that focuses on identifying learners who may be at risk of underachievement. The Agency shows that 'collecting such evidence is essential to examine the effectiveness of approaches to tackle low performance and promote equity and success for all learners' (European Agency, 2017a, p. 48).

School-level data for national-level analysis could, therefore, include information on:

- **Inputs**: learners receiving support – information on their profiles, participation opportunities (enrolment), transition experiences between levels of education, admission policies that underpin the continuity and coherence of education

pathways, success opportunities and inclusion in the school community (OECD, 2011)

- **Processes**: added value of inclusive education compared to other forms of provision (such as separate classes/schools); learners' experiences (looking at the value of inclusive education for all learners)

- **Outputs and outcomes**: effectiveness of the education system for diverse learners, equitable opportunities in terms of access, academic and wider learning and achievements, quality assurance and cost benefit issues, effectiveness of support in meeting learner needs and including them in the school environment; longer-term outcomes, e.g. opportunities after school in employment, further/higher education (Kyriazopoulou & Weber, 2009; Watkins & Ebersold, 2016).

Also with a focus on improvement, the OECD (2023) suggests a similar model to create a framework for identifying areas where more intervention is needed. It suggests that inputs include all sources provided to the system (e.g. financial resources, policies, teacher training, curriculum and leadership). Processes are practices in schools (e.g. development of school climate, collaboration or support to individuals) which help to transform inputs into outcomes. Outcomes include educational outcomes (e.g. participation, drop-out, grade repetition rates and achievement), well-being outcomes (such as sense of belonging, mental health and school climate) and non-educational outcomes (for example, economic and labour market outcomes, and health outcomes).

Specifically regarding equity and inclusion, the input-process-outcomes model can measure, for example, resource distribution and the inclusiveness of curricula (input), school climate and support to learners (process), and how well-being and other non-educational factors differ between diverse groups (outcomes) (OECD, 2018). These issues are further discussed below.

National monitoring of diversity, equity and inclusion

In the 2018 Brussels Declaration, UNESCO committed to strengthening the monitoring of inclusion, equity and quality. The Declaration suggests that this includes:

> … optimizing education governance systems and the use of existing indicators and ensuring more disaggregated data to better track inequalities based on gender, ethnicity, language, income, disability status, migratory status and geographical location (UNESCO, 2018, p. 4).

The *Global Education Monitoring Report 2020* sets out two key purposes for data collection in relation to inclusion:

> First, data can highlight gaps in education opportunities and outcomes among learner groups. They can identify those at risk of being left behind and the barriers to inclusion. Second, with data on who is being left behind and why, governments can develop evidence-based policies and monitor their implementation (UNESCO, 2020, p. 65).

Country education systems differ in how they collect data on diversity in schools. Some systems collect data on a small set of dimensions of diversity. Others consider a wide

range of learner characteristics in policy-making. Some education systems are moving away from collecting data on dimensions of diversity and, instead, focus on support measures (OECD, 2023).

UIS (2018a) suggests that data must be collected on a wider range of characteristics – for example, learners' socio-economic background, disability, geographic region, and racial, ethnic and linguistic characteristics. UIS (2016) recognises, however, that while country-level comparisons are widely available for gender, location and household wealth, these are not generally possible for other characteristics, such as disability, migration and displacement, language, ethnicity and citizenship status. Some causal factors will be discussed below.

Learners with disabilities have, in the past, been invisible in or excluded from most datasets. This is, at least in part, because of the challenges of identification and potential stigmatisation. Recent work has tried to address this issue by rephrasing survey questions to ask about 'the difficulties that children face (relative to other children of the same age)', rather than about the disability/diagnosis (UIS, 2018a, p. 98). The Washington Group on Disability Statistics has developed questions aimed at different population age groups (ibid.). Information-gathering could be further improved by focusing on physical accessibility, teacher education and availability of specialist support and services (UNICEF, 2014).

The Strength through Diversity Policy Survey (OECD, 2022d) shows that, in the national data collections of education systems across the OECD:

- 30 education systems reported collecting data on learners with special educational needs;
- 28 collected data on learners with an immigrant background;
- 22 collected data on socio-economically disadvantaged learners;
- 18 collected data on learners from certain ethnic groups or national minorities;
- 11 collected data on gifted learners;
- 9 collected data on learners belonging to Indigenous communities.

Only two collected data on LGBTQI+ learners.

The Agency (2022c) found that of 35 countries surveyed regarding identification of special needs in legislation/policy, 32 identified learners with disabilities, special needs and learning difficulties. Beyond this:

- 14 recognised socio-emotional difficulties;
- 8 recognised national minorities and cultural diversity;
- 7 recognised socio-economically disadvantaged background;
- 5 recognised migrants, refugees and newly-arrived learners.

Small numbers (four or fewer) identified learners' age-related issues, delinquent and criminal behaviour, experience of crisis or trauma, or living in remote, rural or disadvantaged areas. None identified learners affected by addiction and substance abuse.

Only two countries mentioned out-of-education learners and none included gender, gender identity, LGBTQI+ or gender-related issues (ibid.).

Overall, measures of equity tend to be narrow with a simple disaggregation of learner outcomes or information on inequalities in learner performance. Appels, De Maeyer, Faddar and Van Petegem (2022) note that researchers often fail to explain what equity involves beyond the disaggregation of learner performance. They could consider, for example, the role of schools in counterbalancing inequities, or the interactions between learner performance, background characteristics, teachers and the broader environment (OECD, 2023).

Results of international assessment can also contribute to monitoring diversity; PISA results are disaggregated by gender, immigrant and socio-economic background, where sample sizes allow. It is also possible for countries to supplement the individual national versions of international questionnaires with specific items. For example, in 2018, some countries asked questions about learners' ethnic/Indigenous background or gender identity (OECD, no date). Such data is not publicly reported due to privacy laws, but can provide useful information for national monitoring.

Potential uses for this type of monitoring activity may include:

- identifying key problems and inequalities, such as high out-of-school rates in certain regions and districts, or high drop-out rates linked to specific learner profiles through disaggregated data analysis;

- analysing why these inequalities exist or problems are occurring, in relation to barriers to education participation;

- devising national or regional strategies to improve education participation (UNICEF & UIS, 2016).

Watkins and Ebersold (2016) note that the classification of learners is necessary to gather this type of information and to monitor discrimination against certain learner groups. If the M&E process does not label learners, their risk of becoming invisible to policy-makers may increase (OECD, 2023). The dilemma of labelling is discussed in depth below.

With regard to improving inclusion, the focus of monitoring should be broader than for equity. In addition to examining learners' equal opportunities to reach their potential, monitoring should consider how learners feel at school, their well-being outcomes and socio-emotional development (Mezzanotte & Calvel, 2023). Inclusion indicators can also examine whether learners are really included in the school setting (e.g. their sense of belonging) and explore the barriers learners may face regarding inclusion (OECD, 2023).

Loreman, Forlin and Sharma (2014) examine indicators for inclusive education on three levels (micro, meso and macro), also applying the inputs-processes-outputs model discussed above. They produce a framework containing a range of outcomes, strategies, practices and recommendations from international literature that are suitable for forming indicators to measure inclusive education. They also validate 14 themes, inter-connected across system levels. They say that there is no simple answer to the question 'how are we doing with inclusive education' and stress the need to consider the complexity of this area along with contextual factors at all system levels.

Despite international commitments and increased attention to equity and inclusion, only 11 out of 34 OECD education systems provided criteria for assessing equity and inclusion in their policy frameworks for school evaluation in 2022 (OECD, 2022d). However, 19 out of 34 education systems provided guidelines for assessing equity and inclusion in frameworks for school self-evaluation (ibid.).

However, if data is to be comparable across countries, the issue of terminology must be addressed. Definitions of special educational needs and gifted learners differ widely, as does the administrative category of ethnicity (European Agency, 2020b; OECD, 2023). Collection of data on minority groups must also be carried out in accordance with privacy legislation due to its sensitive nature (e.g. ethnic background or sexual orientation) (OECD, 2023). A further related dilemma occurs around labelling learners from different minority groups.

The dilemma of labelling

As schools respond to the diverse needs of all learners, aiming to achieve equity, the provision of individual support according to categories of need must also change (European Agency, 2022c).

The Agency notes that, although all its member countries are committed to its position on inclusive education systems (European Agency, 2022b), the categorical approach – underpinned by a medical model focused on learner deficits and requiring compensatory measures – is still prevalent in the wording of policy and legislation; 'many countries continue to use categorical descriptions of disability' and forms of 'classification to determine eligibility for services' and to gather data for monitoring/evaluation (European Agency, 2022a, p. 58).

The positive and negative impact of labelling learners with special educational needs and disabilities, as well as those from different ethnic, linguistic or other diverse backgrounds, has been widely discussed (e.g. UNESCO, 2020; OECD, 2023). Labelling has been seen as helpful to inform practice, support communication and guide placement decisions (OECD, 2023). It can also help learners and parents to understand the causes of difficulties and potential solutions (Mezzanotte, 2020; Wienen, Sluiter, Thoutenhoofd, de Jonge & Batstra, 2019). However, labelling can encourage lower teacher expectations (Hart, Drummond & McIntyre, 2007) and lead to learners being judged based on stereotypical ideas about certain difficulties (OECD, 2022d).

UNESCO (2020) stresses that administrative data can be collected for diverse learner groups without using corresponding labels in the classroom – a practice which can result in stigmatisation. Furthermore:

> Monitoring, evaluation, accountability and learning should not only serve the function of collecting data on inclusion but also be inclusive in methodology and actively foster inclusion (ibid., p. 84).

> Identifying groups for statistical or policy purposes need not create a false dichotomy between 'normal' and 'special' groups that distorts efforts at inclusion (ibid., p. 67).

UNESCO argues that the emphasis should be on individual experiences rather than the experiences of groups or categories.

UNESCO highlights a further dilemma, noting:

> Outcomes can be monitored at the population level; service delivery can be monitored at the student level through administrative systems that identify needs. Understanding the purposes and types of inclusion-related data can therefore ease dilemmas of identification (2020, p. 67).

The Agency (2021a) also recognises the issue that this paradigm shift presents: how to fulfil the rights and meet the needs of some learners (for example, learners with disabilities) who require additional support, while working towards equitable education for all. It highlights the growing need to take account of intersectionality when considering the needs of all learners.

UIS recognises that 'sources of inequity frequently compound one another' and affect learners' vulnerability to exclusion (2018a, p. 100). Accordingly, it is crucial to see learner characteristics as inter-connected rather than looking at them in isolation. Such characteristics may include:

> … gender, remoteness, wealth, disability, ethnicity, language, migration, displacement, incarceration, sexual orientation, gender identity and expression, religion and other beliefs and attitudes (UNESCO, 2020, p. 4).

In a recent Agency survey (2022c), only six member countries stated that their legislation referred to intersectionality, indicating that it is still a relatively new concept. Taking this into account in monitoring systems which then inform policy decisions is a particular challenge.

While many countries continue to use labels for funding and/or resource allocation, UNESCO (2020) points out that some are moving towards classifying learners by the types of educational provision required rather than by characteristics. Other countries now focus on the level of support needed (OECD, 2023), which is more closely aligned to the Agency's vision for inclusive education. A key task related to this vision is to monitor the fulfilment of every learner's right to inclusive education – ensuring that they attend a mainstream school with their peers and play a full and active role in school life, as discussed below.

National monitoring of presence, placement and participation

A particular challenge in monitoring and data collection is ensuring that data is gathered on all learners of school age. Inclusion in education is about the presence, placement, participation and achievement or progress of all learners (Ainscow, 2016). Ramberg and Watkins (2020) outline how these dimensions form a hierarchy: presence is a prerequisite for any educational placement, which then determines opportunities for participation and progress.

While most countries can provide data on learners attending early childhood education and compulsory education related to presence (UNESCO, 2020; UNESCO et al., 2021), few have a record of learners who are out of any form of education. However, it is necessary

to take account not only of learners whose right to education is not being fulfilled but also those who are not fully included and participating in mainstream education (European Commission/EACEA/Eurydice, 2020).

Learners present – or out of school?

UNESCO et al. (2021) highlight the importance of data on a particularly vulnerable group: learners who are out of school. The report findings from 30 countries underline that many in the Central and Eastern Europe, the Caucasus and Central Asia region lack legal definitions and data on out-of-school learners. Across Agency member countries:

> The situation of learners who are out of school for different reasons and under different circumstances (i.e. formally enrolled in education but do not attend, or not enrolled in any form of education) is unclear in almost all countries (European Agency, 2018c, p. 8).

As identified by the Agency, this issue is made increasingly complex by the fact that different terms are used for out-of-school learners, including 'not enrolled', 'drop-out', 'early school leavers' and 'not in education, employment or training' (European Agency, 2020b, p. 8). In addition, the term 'absenteeism' is unclear as the duration and frequency of absence could be classified as learners either being absent or dropping out (ibid.). As agreement on key terms is a prerequisite for monitoring and data collection, this issue is problematic.

UNICEF and UIS use the terms 'visible Out of School (OoS) learners' (learners recorded as having been enrolled in school and then subsequently recorded as having left school) and 'semi-invisible OoS learners' (the unrecorded drop-outs and individuals who have never enrolled in school) (2016, p. 20).

However, most data collection does not capture information on those individuals who are not identified by any data or monitoring systems and are not represented in any database i.e. invisible learners. In such cases, cross-sector collaboration is needed to ensure that ALL children are accounted for (UNICEF & UIS, 2016). Section 2 of this review will explore the need for such collaboration.

UNICEF and UIS (2016) suggest that country information management systems should include the number of learners enrolled, those promoted a grade, repeating a grade, dropping out or transferring. The data should be disaggregated for age, gender, ethnicity, disability status, use of minority language and any other factors relevant in the country context that may impact school experience. This would enable governments to ensure that all learners enter school at the right age and monitor measures for learners at risk of dropping out. It would enable a focus on prevention as well as relevant interventions, such as a supported return to schools.

For those who are out of school, data should include 'other' forms of education outside local school settings. The Agency (2020b) examines the concepts of 'out of school' and 'out of education' in more detail, recognising that educational provision is wider than schools, with non-formal education programmes being conducted in various settings, by different providers. However, it is necessary to ensure that such provision does not contravene learners' rights to an inclusive education.

UNICEF and UIS conclude that underlying this issue are key data, analysis and policy gaps, with:

> … a general lack of adequate tools and methodologies to identify OOSC [out of school children], to measure the scope and describe the complexity of exclusion and disparities, to assess the reasons for exclusion, and to inform policy and planning (2016, p. 7).

UNESCO identifies the following forms that exclusion can take:

- 'Exclusion from having the life prospects needed for learning', e.g. living under inadequate health and well-being conditions, such as inadequate housing, food and clothing, limited security and safety.

- 'Exclusion from entry into a school or an educational programme', e.g. being 'unable to pay entrance fees and tuition fees; being outside the eligibility criteria'; 'dressed in ways considered inadmissible by the school'.

- Exclusion from regular participation in school or an educational programme, e.g. living 'too far to attend regularly'; being 'unable to continuously pay for participation'; being ill or injured.

- 'Exclusion from meaningful learning experiences', e.g. teaching and learning process not meeting learners' needs; not comprehending the language of instruction and learning materials; the 'learner goes through uncomfortable, negative and/or discouraging experiences at school or in the programme', such as 'discrimination, prejudice, bullying, violence'.

- 'Exclusion from a recognition of the learning acquired', e.g. 'learning acquired in a non-formal programme not recognized for entry to a formal programme; learning acquired is not considered admissible' for certification; 'learning acquired is not considered valid for accessing further learning opportunities'.

- 'Exclusion from contributing the learning acquired to the development of community and society', e.g. 'learning acquired is considered to be of little value by society'; 'the school or programme attended is seen to have low social status and is disrespected by society; limited work opportunities'; 'discrimination in society on the basis of socially ascribed differences that disregards any learning acquired by the person' (2012, p. 3).

UNESCO (2012) notes that engaging with evidence on these issues can potentially support the search for effective ways to promote all learners' presence, participation and progress.

Placement and participation

Following presence in education, monitoring should also collect data on learners placed in mainstream schools or in specialist provision or alternative forms of education. UNESCO et al. (2021) report that very few countries (9 out of 31 participating in the study) can provide such placement information.

In an analysis of the European Agency Statistics on Inclusive Education (European Agency, 2022d), 22 out of 28 countries provided data on learners educated with their peers in mainstream groups/classes for 80% or more of the time. However, only a few were able to verify this benchmark, while others used placement in a mainstream school as a proxy. Other Agency member countries used a 50% benchmark, raising questions about overall data quality. In relation to a question about learners educated in separate groups or classes, only 18 out of 28 countries were able to provide full information. Responses fell further when the focus turned to learners in provision organised by sectors other than education or those in alternative recognised forms of education or home schooling (ibid.). This highlights the need for improved data in this area to fulfil commitments at both European and international levels to tackle all forms of discrimination, enforce the right to education for ALL learners and, in particular, build a 'culture of shared responsibility' regarding learners requiring provision involving sectors other than education (UIS, 2021, p. 8).

Countries increasingly recognise the need for data on participation in learning opportunities and activities when learners are in school. However, for many, data still mainly focuses on aspects such as financing and resource allocation. The development of national/international indicators for inclusive education would support governments in understanding where and when learners are not fully included, and identifying barriers to inclusion (Schuelka, 2018).

It follows that a system that sees each learner more holistically will require a more comprehensive set of quality indicators. It will require quantitative information, supplemented by a range of information from schools, as discussed earlier in this review.

Data analysis should consider access to and participation in the full range of opportunities, and progress and achievement in all areas of learning. This will include information on:

- which learners receive what services, as well as when and where, ensuring that all learners are counted;

- the quality of services and the outcomes they lead to (avoiding classifying, categorising and labelling learners to provide information on the provision they receive).

UIS concludes that:

> Current progress in education cannot be tracked for the most disadvantaged groups unless there is a strong emphasis on improving educational management and information systems (EMIS) on access and learning, and to link these data to existing household surveys, which contain information about the socioeconomic and demographic characteristics of children, youth and adults (2018a, p. 129).

UNESCO notes: 'A well-functioning education system requires policies that focus on the participation and achievement of all learners' (2017b, p. 21). Thus, a range of information/data is required from schools to ensure that success is broadly defined and relevant data is captured and used to support the development of an inclusive system. These issues will be further explored below.

Monitoring and evaluation to inform policy development and implementation

Section 1 has already recognised that strong M&E systems should compile and integrate a wide range of information into the policy cycle, to support effective governance and accountability in education (UNESCO, 2016). However, the research reviewed has also shown the need for a strategic approach to quality assurance, built on trust and focused on continuous improvement for learners and wider stakeholders.

All too often, national inclusive education policy is aspirational, vague and non-committal (Schuelka, 2017; Singal, 2006). Haug reports that 'there seems to be a gap between formulations and realizations of inclusive education' (2017, p. 206).

To support effective quality assurance and M&E processes, policy must clearly articulate the values of inclusive education (Schuelka, 2018) and what high-quality inclusive education looks like, as outlined in this review's introduction.

As the Agency makes clear: 'Asking the right policy questions is the starting point for collecting data that informs policy in significant ways' (2014b, p. 30). These policy questions can inform the development of indicators that can then be used to reflect on whether key structures and processes are in place. Such reflection can support policy implementation and facilitate on-going M&E. Stemming from the vision of high-quality inclusive education, clear goals should be set and indicators defined before data collection activities take place to ensure that indicators really do measure what matters (Schildkamp, 2019).

Development and use of indicators

Maxwell and Staring (2018) recommend that countries develop a national set of quality indicators for schools that external evaluators can also use. Indicators can 'refine the abundance of available information to present key elements' (OECD, 2022b, p. 1). They have the potential to support policy implementation by contributing to policy design, inclusive stakeholder engagement and a conducive environment (Gouëdard, 2021).

According to UNESCO International Institute for Educational Planning (IIEP) (2015), indicators can be direct or indirect (proxy) indicators. Quantitative indicators may relate to frequency (e.g. of events) and statistical measures, such as percentages, rates, ratios and indexes (e.g. people trained, number of accessible schools, etc.). Quantitative measures may be derived from surveys, research, etc. However, qualitative indicators may also refer to the level of participation of a stakeholder group, stakeholder opinions and satisfaction, etc. Finally, indicators can be categorised according to input-activities-outputs-outcomes-impact, as discussed above.

For indicators to be meaningful, UNESCO IIEP suggests that they can be compared with 'previous observations (and matched against progress)' or 'observations in other countries' or regions, or 'the indicator can compare resources used with results obtained' (2015, p. 14).

Indicators can offer a flexible approach to understanding policy, strategy and the implementation process and reveal how well a system is promoting progressive change (Downes, 2014a; 2014b). Furthermore, they can provide an 'early warning' (e.g. of school drop-out) and support prevention/intervention systems (Downes et al., 2017). Indicators can communicate information to the public and to decision-makers and support the

sharing of examples, highlighting the essential implementation components that facilitate transfer between complex situations (European Agency, 2021c).

According to the OECD, using indicators has become more prevalent to fulfil three key functions:

- 'accountability of schools and administrations';

- transparency of 'resource allocation to demonstrate the efficiency and effectiveness of spending';

- 'identification of strengths and weaknesses of the education system to initiate specific measures for improvement' (2022b, p. 1),

With a focus on inclusive education, using indicators to track equity in both access and learning should ensure that minimum standards are met and that equity gaps are narrowed (UIS, 2018a).

The National Academies of Sciences, Engineering, and Medicine state that two types of equity indicators are needed:

> (1) indicators that measure disparities in students' academic achievement and attainment outcomes and engagement in schooling; and (2) indicators that measure equitable access to resources and opportunities, including the structural aspects of school systems that may affect opportunity and exacerbate existing disparities in family and community contexts and contribute to unequal outcomes for students (2019, p. 37).

Indicators should acknowledge that the learner is at the centre of a series of systems that work together to shape the learner's development (European Agency, 2017b; 2017c). Looking at the system holistically can support consistency and align the actions of different stakeholders in planning, implementation and M&E across school, local community, regional and national levels, potentially increasing efficiency and effectiveness. The next section of this review covers this in more detail.

A holistic approach should draw on the full range of information produced by the activities discussed above – school self- and external evaluation, staff appraisal, learner formal assessment and teacher assessment, as well as data on learner enrolment, placement, participation and achievement at regional and national levels. This will overcome the possible negative consequences associated with high-stakes approaches discussed earlier, which can also apply when indicators are decontextualised, chosen for ease of measurement rather than because they measure performance accurately (O'Neill, 2002).

Discussing composite indicators, Adams et al. (2017) raise issues around the accuracy and legitimacy of decisions made about schools. They note that school effectiveness and an education system's health cannot be evaluated 'from a single summative outcome indicator' (ibid., p. viii). They stress the need for explanatory evidence to make sense of school outcomes and draw attention to the possible loss of data on the performance of diverse groups and/or across subjects.

The development of indicators and related practices is complex; it requires 'the right balance between guiding development and strengthening accountability' (OECD, 2022b,

p. 1). For this reason, Datnow and Hubbard (2015) recommend that using indicators to support implementation is decoupled from external accountability. This can build trust among stakeholders and, ultimately, emphasise the role of indicators in school improvement.

Effectively using information requires a positive attitude towards data to influence 'how indicators are perceived and trusted' and, therefore, how far they can support implementation (OECD, 2022b, p. 5). In schools, local authorities and at national level, stakeholders need to be able to find relevant data in the system, understand it and the underlying statistical concepts, interpret relevant information and recognise limitations and, finally, use data to support decision-making and pose further questions to explore through the data available (Means et al., 2011, in OECD, 2022b, p. 5).

> Framing data use as a continuous school improvement process, and not solely as compliance to accountability demands, contributes to aligning stakeholders' beliefs, attitudes, and perceptions about data use (OECD, 2022b, p. 5).

It is therefore more likely to support successful policy implementation.

The need for a strategic approach

In 2015, the European Commission recognised that, in many countries, quality assurance systems were not sufficiently consolidated and lacked coherence and strategic thinking. In reality, day-to-day emergencies can quickly overwhelm stakeholders at all system levels, but it is crucial that strategic thinking continues to guide practice.

Overall, a strong education management information system is needed to:

- enable governments and schools to fully understand where learners are not included;
- identify barriers to inclusion and 'at-risk' children;
- raise awareness of marginalisation;
- facilitate communication between national and local levels.

Accurate data is also important for finance and resource distribution (Schuelka, 2018). As mentioned earlier in this review, this aspect is often overlooked.

According to UNESCO IIEP, education management information systems can provide measures of:

- Access and participation …

- Internal efficiency …

- Quality (pupil-teacher ratio, percentage of primary school teachers with the required professional qualifications …)

- Finance (public expenditure on education as a percentage of GDP, public expenditure on education as a percentage of government expenditure,

… teachers' remuneration as a percentage of public recurrent expenditure on education) (UNESCO IIEP, 2015, pp. 29–30).

The European Commission (2020a) stresses that, as the focus is on improving student learning and well-being, bottom-up change is needed, with support for schools to successfully enable all learners to achieve. In providing support, governments will need to consider three key actions or 'implementation drivers' (Fixsen, Blase, Naoom & Duda, 2015) and ensure that mechanisms are in place to:

- 'develop, improve and sustain' implementation 'to benefit children, families and communities' (competency drivers)

- 'create and sustain' enabling 'environments for effective services' (organisation drivers)

- provide 'the right leadership strategies', matched to the challenges that emerge from the change process (leadership drivers) (ibid., p. 2).

In short, as expressed by UIS:

> Efforts are needed to ensure that stakeholders understand, value and effectively use the information to ensure inclusive and equitable quality education for all, and that virtuous cycles of measurement/action/re-measurement are used to improve children's lives (2018b, p. 22).

Synthesis of key issues for further discussion

This section considers the importance of effective M&E in going beyond accountability to support continuous improvement of the education system. Considering equity and inclusion, research shows that countries best placed to tackle educational disadvantage and social exclusion have well-established monitoring systems. These systems allow them to link the participation of and 'outcomes for disadvantaged groups and effectively monitor inequalities in education' (Budginaitė et al., 2016, p. 63).

Inclusive education policy is ultimately implemented in the classroom. As such, M&E at school level is crucial to ensure that stakeholders 'understand, value and effectively use the information to ensure inclusive and equitable quality education for all' (UIS, 2018b, p. 22).

The following M&E issues are identified for further examination in the development of a multi-level, multi-stakeholder quality assurance, monitoring and accountability framework that is underpinned by effective M&E processes.

Schools need support to develop a culture of reflection to enable a shared understanding of key concepts that inform effective self-evaluation. Self-evaluation should focus on school structures, processes and activities that impact learners. This will ensure that their rights to full participation and quality support are met, leading to learning success and community affiliation. For this, **strong leadership is required to build capacity and use data/information effectively for continuous improvement**, working with all stakeholders – but primarily learners.

External evaluation (school inspection) plays an important role in the quality assurance process to check compliance and use of resources. This process can focus on schools needing additional support and/or can serve to share innovative practice. The literature reviewed highlights the need for a 'health warning' regarding high-stakes approaches, including the publication of reports and results. Where there is a top-down approach to quality assurance and external inspections are seen as 'control' mechanisms, it will take time to change the mindset. However, **flexibility should be provided to allow for more individualised inspection reports and supportive interactions, with professional dialogue designed to support improvement**.

To ensure high-quality learning and teaching, the process of teacher/leader appraisal also plays a key role. Here, there is a need for **investment in teachers' professional capital, building trust and using a range of data/information to make judgements in a way that contributes to increased teacher effectiveness**. Given higher levels of autonomy, leaders need access to support to make decisions that impact equity and inclusion and lead to continuous improvement for all learners.

While national or international tests can be an effective measure of learner performance, the stakes are raised if data is used to rank schools, particularly where the focus is on academic achievement at the expense of wider learning and well-being. This potential impact can be mitigated by focusing on wider skills and competences and using teacher assessment and a range of evidence from different stakeholders. **This more holistic view of learners will take account of formative and summative assessment information and play a crucial role in developing a more balanced understanding of learner development.** As Ainscow et al. (2016) point out, where countries value narrow criteria for success, monitoring systems can work against the development of a more inclusive education system.

Stakeholder involvement is also crucial for developing inclusive systems. **Networks between schools and involving wider stakeholders from other agencies, civil society, etc., may support school leaders more effectively than vertical structures.** However, they require effective leadership and co-ordination with clear lines of responsibility and accountability often provided by 'middle tier' or municipality-level stakeholders. **Schools can also benefit from working with researchers to improve evaluation of policy and practice to support improvement.**

The European Commission stresses that: 'No single internal or external quality assurance mechanism can provide all the information needed for school accountability and development' (2018a, p. 7). **A combination of different processes and mechanisms should be used – across different stakeholders – to 'provide important and complementary insights on school, teacher and student performance and support evidence-based decision-making'** (ibid., p. 7). Multiple measures of school and learner performance will also help to reduce the impact of high-visibility school evaluation and learner assessments (ibid.).

At national level, **countries need to compile and integrate information from school, community and regional/country levels for accountability** (including to international commitments) and improvement.

While 'measuring' education, and particularly inclusive education, is challenging, **a range of measures is needed** (as outlined above) **to provide a holistic view of the system**. This will include measures of learner outcomes that show progress and achievement beyond test scores, which lack the 'voices and views of those who work, learn, and teach in schools' (Smith & Benavot, 2019, p. 195).

Regarding diversity, equity and inclusion, more disaggregated data is required to highlight gaps in opportunities and outcomes, and to monitor policy to address current issues and inform future developments. Data on all learners is needed to monitor presence (school attendance), placement (in inclusive or segregated settings) and participation levels. In particular, research shows there is a lack of tools and methods to identify children who are out of school or any form of education – a requirement at both EU and international levels.

The dilemma of labelling is also raised and warrants further consideration. While labels are needed for administrative purposes, to gather information on certain (often vulnerable/minority) groups, countries need to ensure that labels are not used in schools or applied rigidly to allocate resources. Overall, stakeholders need to view learners as individuals with diverse and inter-connected characteristics and focus, for example, on the level of support needed.

Overall, **countries need broad criteria to monitor the success of the school system, developing inclusive qualitative and quantitative indicators that can be used across system levels, covering various sectors and services, with flexibility to accommodate differences in local contexts**. Such a quality assurance process supports school improvement, providing information in line with input and process indicators for learner-centred planning, decision-making and policy development (formative). The information can fulfil an accountability function through summative outcome indicators, while also addressing efficiency and effectiveness.

Finally, section 1 examines policy development and implementation. An overarching requirement is to clearly establish what high-quality inclusive education looks like to inform policy and practice through the education system. Aligning views and beliefs on what constitutes a 'good education' and finding a common language between stakeholders is crucial (Ehren et al., 2013). **Among the key challenges identified by UNESCO (2020) were the 'different understandings' of inclusive education, the 'absence of data on learners who are excluded from education, inconsistent national policies, and the persistence of parallel systems and special schools'** (European Agency, 2022a, p. 81).

Overall, this review shows that most countries lack a strategic approach to quality assurance that links national, local, school and classroom/learner levels and has a clear focus to support the coherence of all policies. Section 3 explores the issues raised in this summary in more detail.

UNESCO (2016) notes that increased stakeholder participation can improve the quality of monitoring and accountability by providing information on a wider range of indicators. The next section examines the topic of collaboration, particularly its role in quality assurance and accountability.

SECTION 2 – SUPPORTING COLLABORATIVE CROSS-SECTOR WORKING ACROSS SYSTEM LEVELS

Collaboration among stakeholders across and within levels of the education system is widely seen as a key strategy for school improvement (Ainscow, 2016). Collaboration is a social process, requiring democracy and professionalism rather than bureaucracy and market forces (Hargreaves & Shirley, 2009) to create pathways 'through which expertise and lessons from innovations can spread' (Ainscow, 2016, p. 14). International evidence demonstrates that the best performing education systems are those in which the foundations for such collaboration – and learning – are well-established (Farrar, 2015).

In particular, cross-sector collaboration and partnership are about 'utilising the roles, knowledge and responsibilities of multiple public, private and non-profit actors to reach innovative solutions and results, which could otherwise not be obtained' (European Commission, 2022, p. 6).

The fabric of society has changed in recent decades, and individuals have greater choice and operate in a wider range of horizontal professional and social networks, making central co-ordination increasingly complex (Theisens, 2012). Central government, therefore, is no longer seen as the most effective way to address the needs of a more global and inter-dependent society. Policy-makers must 'recognize that the details of policy implementation are not amenable to central regulation' (Ainscow, 2016, p. 14).

This section considers the role played by collaboration and cross-sector working in implementing policy for inclusive education at all levels of the education ecosystem. This will include:

- the importance of culture and positive relationships to support collaboration and the development of inclusive policy and practice;

- developing a coherent and supportive policy context which requires governance, leadership and effective co-ordination at local and national levels;

- the impact of collaboration on accountability and quality assurance.

Considering the dynamic and fluid interactions that take place within and between the various levels of the education system, this work draws on the Agency's ecosystem model, placing the learner at the centre (2016a; 2017c). The model recognises the importance of relationships and joint working between all actors and between various elements and levels of the education system that support schools and learners.

This section focuses on cross-sector collaboration. Nevertheless, it also considers the importance of collaborative culture and relationships within and between schools and with families and the local community, as these underpin and influence work with other agencies and across levels of the education system.

> Complex problems of vulnerability call for more systemic, 'ecological' responses which involve interventions in families and communities alongside help for children and young people (Edwards & Downes, 2013, p. 69).

An ecosystem for inclusion and equity as a basis for collaboration

Collaboration at all levels of the system can create an ecosystem of leaders, teachers and learners who learn together. Teachers and leaders are empowered to innovate, and together improve professional knowledge, skills and practices, with attention to learner well-being and equity (Hargreaves & Fullan, 2012).

The European Commission (2015) recognises the importance of national and local contexts and suggests that countries need to explore different stakeholders' roles and the processes followed at different system levels. Such an analysis could be supported by an ecosystem model (European Agency, 2016a; 2017c), which sets out the main structures and processes that influence every learner's participation and that must be considered to maximise opportunities for learning and achievement. The model places the learner at the centre and considers the micro, meso, exo and macro levels that work together to shape holistic learner development.

The structures and processes at work in the ecosystem can be linked to an 'ecology of equity' (Ainscow, Dyson, Goldrick & West, 2012). This refers to the extent to which learners' experiences and outcomes are equitable – dependent on the educational practices of teachers and schools, as well as a range of interacting processes that 'reach into the school from outside' (Ainscow et al., 2016, p. 28). These include the local area's demographics, the 'histories and cultures' of the people 'who send (or fail to send) their children' to school, and the 'economic realities faced' by those people (ibid.). These interacting structures and processes also reflect models of school governance, the establishment of school hierarchies and the impact of these on school policy and practice (Ainscow, 2016).

The education ecosystem includes both concrete, visible elements (e.g. people and resources) and abstract, invisible elements (e.g. group priorities and culture). The 'deep structures', which include elements such as values and beliefs, are the most effective in transforming systems. Failure to address these structures can amount to 'tinkering around the edges' (Winthrop, Barton, Ershadi & Ziegler, 2021, p. 12), which is unlikely to lead to sustainable change.

Given such complexity, evidence suggests that centrally-driven initiatives may not necessarily be the most effective way to facilitate sustainable collaboration among schools (Hayes & Lynch, 2013). The ecosystem model can serve to examine the wider policy context in which schools operate – and which influences the experiences of learners and their families.

This section will now look at how collaboration can benefit learners and families.

The benefits of collaboration in and around schools

Collaborations, both inside and outside the school, increase in importance during changing and uncertain times (Pino-Yancovic, Ahumada, DeFerrari, Correa & Valenzuela, 2022). In the context of inclusive education, cross-sector and inter-professional collaboration at all system levels can share expertise and knowledge. It can also articulate

different perspectives to increase the chances of 'reaching balanced and workable decisions on how best to implement a policy' (Jones, 2016, p. 22).

> The legacy of COVID-19 is also likely to require a wider range of services (e.g. health and social sectors) to work more closely with the education sector. Success here depends on joint working from ministerial level to regional and local services to ensure support for schools to address these key areas. This approach also emphasises the need for structures and processes that enable policy and practice to transfer effectively between system levels (European Agency, 2021a, p. 9).

A collaborative school is the key to raising the achievement of all learners (European Agency, 2018d). Establishing the following principles will help to maximise the benefits of collaboration for all stakeholders:

- The collaboration needs to be continuously warranted for everyone

- Teachers and other stakeholders need to be involved in planning and developing the collaborative effort

- Trust-building leadership is vital

- Clarity facilitates collaboration

- Good interprofessional and cross-sector collaboration needs to be learnt (Nilsson Brodén, 2022, in McGrath, 2023, p. 13).

Crucial to all learners – but maybe more important for learners with additional support needs – is the provision of additional services and therapies. With specific reference to cross-sector working, Patana sets out four steps:

- Co-ordination of services is 'a crucial first step' for a holistic approach to service delivery. It serves to make best use of existing resources and 'connect multiple sectors' at the service delivery level and other government levels involved in the policy process. Co-ordination can reduce duplication of services and enable users to access the services they require.

- 'Collocation refers to locating all relevant agencies at a single site'. This may mean, for example, 'having health, mental health, counseling and social support services all available in schools'. Collocation reduces costs, improves accessibility and can 'enable service providers to communicate and collaborate more effectively'.

- 'Collaboration involves inter-agency work via information sharing, joint training, and the establishment of a network of providers'. It often improves the experiences of service users.

- Co-operation 'brings the greatest degree of integration. Whereas collaboration involves work between agencies', co-operation entails service professionals communicating and working together (2020, pp. 4–5).

The European Commission (2015) notes that when all stakeholders take responsibility for the quality of the education they provide and commit to continuous improvement, decisions that ensure quality are more likely to be put into practice. This is particularly true in the context of inclusive education (European Agency, 2018d) when collaboration across sectors and across system levels is crucial in a holistic approach to support all learners. The next section discusses the importance of culture, relationships and support for collaboration in and around schools.

A culture of collaboration within schools

In the context of collaboration, Pigozzi suggests that quality education is not just a list of elements but a 'web of commitments', in which education is 'understood in terms of a larger context that reflects learning in relation to the learner as an individual, a family and community member, a citizen and as part of a world society' (2006, p. 42).

Putting the learner at the centre of the ecosystem, collaboration in and around schools clearly influences policy, practice and on-going improvement. In research by Celep, Brenner and Mosher-Williams (2016), culture emerged as a necessary element in achieving transformational improvement. Brenner provides more detail, saying that:

> Culture involves the articulation and consistent, long-term promotion of the values, norms, and daily behaviors that allow people, organizations, and communities to align their actions in a disciplined way that contributes to progress (2018, p. 7).

Brenner (ibid.) also notes that cultures that bring about positive change need to be transparent, authentic, collaborative and open to risk. Such characteristics work together in a dynamic way to create a stronger system.

A school's culture, values and beliefs play a role in shaping relationships that, in turn, provide the context for all teaching and learning (Florian, 2017).

> Relationships – amongst students, amongst staff and between staff and students – are at the heart of understanding and developing policies and practices which support inclusion and achievement (Florian, Black-Hawkins & Rouse, 2017, p. 133).

Discussing the importance of collaboration within schools, Ainscow (2016) highlights the need to develop a common language as a basis to experiment with new possibilities, stimulate self-review and engage with learners' voices. The Agency notes the importance of a 'participatory school policy' (2022e, p. 50) to give learners a more active role in shaping their own learning processes. More recently, the Agency has highlighted the need for ethical approaches at all stages of participation, along with the importance of building the capacity of learners and families to participate (European Agency, 2023).

Inclusive schools welcome all learners without exception, appreciating diversity and attending to relationships between all stakeholders as a priority (Donnelly, Ó Murchú & Thies, 2016). This may include using the potential of learners as a resource for one another (OECD, 2022a), as well as providing time and resources for staff collaboration,

which 'motivates all stakeholders to engage fully in the life of the school' (European Agency, 2018d, p. 81).

For teachers and school leaders, the concept of being a professional is changing – moving towards a 'connective professionalism' which is more inter-dependent, process-centred and networked (Noordegraaf, 2020; Mezza, 2022). Teachers often collaborate as an integral part of their work (OECD, 2020; 2019b). The OECD Teaching and Learning International Survey (TALIS) shows that more inter-dependent or deeper forms of collaboration are linked to higher levels of teacher satisfaction (McGrath, 2023). Collaboration and dialogue with peers and stakeholders from all disciplines help teachers to learn and grow, reflecting on how to improve and innovate teaching and schools.

A further key collaboration which impacts directly on the learner is the relationship between learners, learning support assistants (LSAs) or teaching assistants and teachers. Collaboration between LSAs and teachers has been highlighted as pivotal in providing effective support (Devecchi & Rouse, 2010), including through work with support professionals from other sectors. However, Webster, Blatchford, Bassett, Brown, Martin and Russell (2010) caution against LSAs becoming the primary educators of learners with special educational needs and disabilities and inadvertently encouraging dependency. Due to a lack of quality time for liaising with teachers/other staff, LSAs do not always feel well-prepared. As a result, they may focus their work with learners on task completion rather than learner understanding (Sharples, Webster & Blatchford, 2018). LSAs have been found to provide good support to teachers with administrative, planning and assessment tasks and, with clear preparation, can be effective when providing high-quality one-to-one and small-group support (ibid.).

The development of a culture of collaboration among all school staff is a prerequisite for collaboration with other stakeholders. The following sections will explore this.

Collaboration with parents and families

Family-school engagement has an important role to play in improving and transforming education systems (Winthrop et al., 2021). Important here – as in other areas – is a shared sense of 'this is what school is about'. In a study of systems in Canada, Finland and Portugal, Barton (2021) found that the primary barrier to progress was a misalignment between members of the community on their beliefs and values about school. Deep and respectful dialogue was the key to unlocking the system transformation process.

The COVID-19 pandemic further heightened the importance of this relationship. In this context, the European Commission (2021) stressed the importance of school collaboration with parents and families to increase mutual understanding.

The pandemic also raised expectations around parents' engagement in their children's education and impacted on views of what quality education should look like (Winthrop et al., 2021). Co-operation and communication between the school sector and the home environment is a key goal identified in light of the pandemic (Beattie, Wilson & Hendry, 2021). Co-operation between home and school is ultimately a cornerstone of more equitable and inclusive education (Shaw & Shaw, 2021) and particularly co-operation regarding the use of digital tools (OECD, 2021a), an issue which came to the fore during school closures (European Agency, 2022e).

The OECD (2021b) found that communication between teachers and parents or families can help to counteract inequalities, providing parents with advice and support (OECD, 2021c). The World Bank (2020) also identified communication with families as a modest investment that can significantly improve learner outcomes.

Ferguson notes that strong family-school links involve a 'mutuality of interaction and collaboration that commits both home and school to each other' (2008, p. 117). Practice is more effective when schools identify a staff member or a team to lead on family engagement (Goodall & Vorhaus, 2011). Commitment to working closely with parents/caregivers can positively impact on contact with other services, e.g. from welfare, health or third sector (Welsh Government, 2023), as well as others in the local community by, for example, supporting consistency in support and implementation of advice.

Collaboration with the local community

The OECD (2022a) recognises the need for schools/learning communities to draw on the support of stakeholders in the wider community who play a significant role in young people's lives. The development of social capital within school communities can support formal learning and informal connections that extend learning opportunities (Iyengar, 2021).

Chapman (2019) draws on work by Ainscow and West (2005) and refers to progressively deeper levels of partnership for which social capital is required to overcome stakeholders' 'tussles for power, influence and status' that occur in traditional hierarchies (Armstrong, Brown & Chapman, 2021, p. 324). The levels are:

- Association – a traditional hierarchy with incidental meetings and little knowledge-sharing

- Co-operation – 'characterised by short-term activity around specific issues' with some 'superficial and task-focused' knowledge exchange

- Collaboration – 'in which the joint activity becomes more sustainable' with 'common goals, shared values and the potential to develop new ways of working'

- Collegiality – where 'longer-term commitments to the partnership emerge', 'underpinned by strategic goals and objectives, common values and a focus on shared knowledge, resource and practice development' that benefits all partners (Armstrong et al., 2021, p. 324).

'Stakeholder mapping provides an important opportunity to consider the relationships that already exist, could exist, or could be reframed to benefit teachers' work' (McGrath, 2023, p. 18). Identifying various stakeholder groups can introduce multiple perspectives on a policy or idea for change which, in turn, can support more effective implementation (Raum, 2018). Input from various community members – for example, business leaders and sports professionals – can support learners' awareness of the labour market and bring learning 'closer to real-world contexts' (McGrath, 2023, p. 19). This, as the Agency points out in its Raising the Achievement of All Learners in Inclusive Education project (2018d), can be an effective strategy for raising achievement, particularly for learners at risk of disengaging from education. The Agency's project provides examples of successful school collaborations with community care facilities, sports clubs, colleges and employers to

extend the curriculum and the range and relevance of activities to engage all learners (ibid.).

Schools can also benefit from collaboration with external researchers or advisers to develop M&E skills (Nelson, Ehren & Godfrey, 2015). The terms 'inquiry' or 'research-informed' are used, 'particularly when internal evaluation becomes a regular event, with successive evaluations building on the one before in a "cycle of inquiry"' (ibid., p. 24). Such a process can support schools and partners to develop a common language and shared understanding of the goals of evaluation. This can focus attention on aspects relevant to equity and inclusion, such as outcomes for diverse learners, school conditions that promote equity, and relationships with diverse communities (ibid.), taking the contributions of stakeholders from all sectors and services into account.

Cross-sector working in schools

Learning outcomes improve when learners receive additional services that promote physical, mental and emotional health, assure safety and transportation, and address other social needs (UNESCO, 2014; Patana, 2020). A partnership approach between services such as health and social care recognises each child's holistic needs and aims to provide integrated responses to children and families (Castro & Palikara, 2016). This can also increase efficiency (Castro-Kemp & Samuels, 2022) and address inequalities in health outcomes, which strongly correlate with inequalities in educational outcomes (McLeod, Uemura & Rohrman, 2012; Corter, 2019).

When services are part of a holistic package, they become more accessible, making users more likely to take them up (Statham, 2011). As most children (including those less likely to access health and/or social services) attend school, provision of services on-site can represent the most 'efficient allocation of attention, instruction, care, monitoring, and identification of needs for large amounts of the population in a non-stigmatizing, time-efficient manner' (Patana, 2020, p. 6). Edwards and Downes also recommend linking services to schools, as 'the only universal service where the well-being of children and young people can be regularly monitored' (2013, p. 73). However, they report that 'policy-led co-location' of different services is insufficient and that efforts to support 'inter-professional collaborations at the point of service delivery' are also needed (ibid., p. 9).

Effective service delivery (e.g. relating to health or social care) is best addressed through whole-school structural decisions aimed at creating fully inclusive schools. This is well-documented in the literature (e.g. McLeskey, Waldron & Redd, 2012; Theoharis, Causton & Tracy-Bronson, 2016) and requires a framework of inclusion and a common mission among stakeholders (Tracy-Bronson, Causton & MacLeod, 2019). Overall, flexible service delivery is critical to effectively support learners (ibid.). Research (e.g. Ehren & Whitmire, 2009) has shown that learners' needs are best addressed in environments where they have opportunities for socialisation and interaction with peers and where therapists provide class-based services as well as consultation.

Ehren and Whitmire (ibid.) report that therapists found collaborative and proactive approaches to supporting learners improved when related service therapists' and teachers' roles and areas of expertise were explicitly defined. This aligns with other research that suggests such clarification is required to enhance collaboration between

professionals (Giangreco, Prelock & Turnbull, 2010). This allows these professionals to move from an 'advice giving' role to being 'equal partners' in the learning experience (Gallagher, Tancredi & Graham, 2018, p. 130). Such practice also enables new challenges to be tackled with the advantage of multiple perspectives (Nilsson Brodén, 2022) – for example, taking a team approach to teaching and providing supports and modifications for learners.

The impact of integrated services is probably greatest for learners with the most complex support needs. Although there may be some difficulties related to measuring outcomes and evaluating integrated services, such integration has been shown to positively affect education outcomes and physical, mental and financial well-being (e.g. Centre for British Teachers Education Trust, 2010; OECD, 2015c). In addition to making savings due to the use of single sites, reduced transport costs and stress, users are less likely to become discouraged or overwhelmed by the number of appointments. It may also help to reduce duplication of services (Tyldesley-Marshall, Parr, Brown, Chen & Grove, 2023) and dependency on welfare and social services over time (OECD, 2015c).

Finally, a potential benefit of working closely with other agencies is the sharing of data. Berendt et al. (2017) reported that, for learners with a variety of equity challenges (disability, behaviour, family circumstances, etc.), data is often highly fragmented across multiple services, including healthcare, social services, police and justice systems, and carers. They found that interventions for learners mostly involved physical meetings between agencies, with each collecting its own data on learners, in its own format, making it very difficult to join up the data – and potentially contributing to safeguarding issues. This is an example of one issue that might be addressed through effective co-ordination at local level, as discussed in the next section.

Collaboration at local level

'Education policies alone cannot disrupt inter-generational cycles of deprivation and tackle educational disadvantage' (Truszczyński, in Edwards & Downes, 2013, p. 7). Cross-sector approaches, as discussed above, 'are required, to link education and training policies' with 'employment, finance, youth, health, justice, housing, welfare and other services' (ibid. 7).

The idea that the organisation of education 'is best suited for decision-making, ownership, and administration on the local level has gained widespread acceptance' (Wilkoszewski & Sundby, 2014, p. 6). This move away from hierarchical (vertical) relationships between schools and national government, towards greater decentralisation and multi-level governance has, however, led to increased complexity. It involves a wider range of stakeholders at local level while still holding the central level, i.e. national ministries of education, responsible for ensuring high-quality, efficient, equitable and innovative education.

The Agency (2016b) suggests that more decentralised systems appear to create a greater opportunity for developing innovative forms of inclusive education. This transfer of responsibility can result in increased accountability and efficiency due to the shorter distance between parent and policy-maker or policy-maker and school (Weidman & DePietro-Durand, 2011).

National education ministries have begun developing 'various strategies and approaches to close' 'governance gaps', often using 'softer modes of governance' to 'complement or even substitute for classical steering mechanisms of rigid regulatory or fiscal controls' (Wilkoszewski & Sundby, 2014, p. 9). As governmental and non-governmental actors collaborate, hierarchies become less visible and knowledge of policy co-ordination can be used to examine the 'conditions that may be conducive to horizontal cooperation' (Wallner, 2017, p. 417) and avoid fragmentation and barriers to this co-ordination (Jungblut & Rexe, 2017).

There is a need to identify factors that lead to co-ordination mechanisms based on mutual learning in education policy, such as more informal and trusting relationships and flexible modes of co-operation that occur between stakeholders (Capano, 2015).

If poorly co-ordinated, decentralised systems can face effectiveness, equity and accountability issues (European Agency, 2016b). Strong local co-ordination has been identified as critical in mediating between school delivery and central government (Mourshed et al., 2010). Such structures can provide targeted support to schools and interpret and communicate improvement objectives. They can also manage resistance to change and enhance exchange between schools (OECD, 2022a). Such a 'coherent "middle tier"' can offer an authoritative co-ordinating influence to bring consistency and sustain improvement (ibid., p. 242). In leading from the middle, local authorities/municipalities can become 'collective drivers of change and improvement by strengthening social capital in their area' (ibid., p. 243).

This local co-ordination can also address potential policy tensions. For example, the growth of private school improvement services in some countries creates a cycle, where the private sector influences public policy. This, in turn, opens up scope for the private sector to (perhaps indirectly) profit from the public education system. The private sector's involvement is then further increased, along with its influence in the provision of public education (Ball, 2009).

One possible solution might be to develop the role of school-to-school support. Such networks can contribute to school improvement, including in schools with large proportions of diverse learners and schools facing challenging circumstances (Ainscow, 2012; Ehren, Janssens, Brown, McNamara, O'Hara & Shevlin, 2017).

School-to-school networks

'Collaboration between schools has an enormous potential for fostering the capacity of education systems to respond to learner diversity' (Ainscow, 2016, p. 8). In particular, it can reduce the polarisation of schools and benefit learners who appear to be marginalised and whose performance and attitudes are a cause for concern (ibid.).

Armstrong et al. (2021) found little evidence of inter-school collaboration directly impacting on learner outcomes. However, taking a broader view, they found more evidence relating to improvements in staff professional development and career opportunities (e.g. Hill, Dunford, Parish, Rea & Sandals, 2012), sharing innovations and good practice (e.g. Stoll, 2015), reduced workload for school leaders and more efficient organisation and financial efficiency (e.g. Woods, Armstrong, Bragg & Pearson, 2013). This shows that teachers, school leaders and other educational stakeholders all gain from collaboration with colleagues outside of their own schools/institutions and that this

(indirectly) benefits the young people within their schools, leading to improved educational experiences. At times of transition, when links and information exchange between schools can have a more direct impact, promoting connectedness to the new school and attending to learner well-being can be beneficial (Symonds, 2015).

Networks can be more able to effect change than bureaucratic and hierarchical organisations controlled from the centre (Popp, MacKean, Casebeer, Milward & Lindstrom, 2014). Bringing stakeholders together in an inter-dependent relationship can increase the effectiveness of services (Klijn & Koppenjan, 2014) and help to address complex policy problems where stakeholders need to combine resources to achieve solutions.

In bringing schools together to form partnerships, however, several issues require deeper consideration as, despite its potential, this area of work is far from straightforward. 'Terms such as "partnership", "network", "cluster", "family", "federation", "engagement" and "collaboration" are used interchangeably to describe' the different ways that schools work with one another (Armstrong, 2015, p. 6). This range of terms increases complexity and makes it harder to identify evidence of the impact of such practices (ibid.). There can also be a conflict with marketised and competitive systems in an 'unusual cocktail of collaboration and competition' (Armstrong & Ainscow, 2018, p. 4). Keddie (2015) writes that, in the context of decentralisation, a standards and audit culture may put pressure on schools to create a distinctive identity from other schools, rather than collaborating with them.

Where schools' responsibility for their own improvement underpins reforms, it presents school leaders with a 'policy paradox'. This 'requires them to work with their counterparts in other schools' – with whom they are also in competition – to improve/maintain their position in 'local, regional and national hierarchies' (Greany & Higham, 2018, in Armstrong et al., 2021, p. 321). Ainscow (2016) observes that, where schools are responsible for their own admissions and can select their intake, segregation may occur, with implications for equity. This practice, along with parents' capacity to exercise choice, may accentuate 'stratification based on social factors and academic ability' (Glatter, 2012, p. 565) and work against co-operation.

Generally, within school networks, the idea of shared leadership should challenge competition between schools, building trust and strengthening collaborations that can improve inclusive practices (Ainscow, 2010).

Further tensions may occur if schools have few incentives to engage in joint planning, share risks or give up their autonomy to a network-level authority. Some schools may struggle to fulfil school goals (such as those set by school inspections) and collaborative goals (such as supporting colleagues in lower-performing schools within a network). In such cases, single school accountability can work against collaborative relationships and undermine the integration of tasks and joint service provision (Sedgwick, 2016).

Muijs and Rumyantseva (2014) note some of the conditions that are likely to be required where competition and co-operation coexist. They include clear goals, benefits for all partners and strong trust, with leadership that is sensitive to potential tension between partners, including those beyond the school. Capacity building for school staff may empower them in shared activities such as sharing data, which can create opportunities

for 'strategic conversations with peers from other schools that challenge existing ways of thinking and working and raise new possibilities for improving teaching and addressing barriers to participation and learning' (Ainscow et al., 2012, p. 206).

In short, 'there is considerable evidence that school-to-school collaboration can strengthen improvement processes by adding to the range of expertise' available (OECD, 2022a, p. 242), if effectively co-ordinated at local level and provided with a supportive policy context from national level.

Collaboration at national level

Collaboration, particularly across sectors, is challenging at all system levels but may be particularly so at national level. UNESCO (2020) observes that, due to this high level of challenge, integrated service delivery is yet to be realised in many countries.

In moving towards more inclusive policy and practice, many issues will inevitably span the responsibilities of departments and agencies. All ministries, local governments and non-government partners need to work closely together (and with schools and communities) to ensure the development and implementation of an effective M&E framework to support continuous improvement (OECD, 2023), keeping in mind that: 'Disjointed services and communication protocols, inadequate coordination efforts, insufficient capacity and financing lead to poor implementation and weak accountability' (UNESCO, 2020, p. 109).

Important here is horizontal integration, which refers to the capacity of government departments in charge of different policy issues to work together. Vertical integration – 'which refers to consistency, coordination and collaboration across different levels of government' – is also crucial (United Nations Department of Economic and Social Affairs, 2021, p. 1). It requires leadership from decision-makers at national level to avoid some of the issues discussed above, which affect policy and practice at local and school levels (ibid.).

Well-integrated services can bring potential cost savings (Cattan, Conti, Farquharson & Ginja, 2019). Research suggests a correlation between local authorities that have a strong collective culture and those that manage their budgets effectively (Department for Education, 2022).

Cross-sector co-operation between ministries of education, health, social care, housing and labour at national level should therefore encourage and promote inter-agency and inter-disciplinary co-operation at other levels. This will enable all stakeholders to provide cohesive services and a continuum of support at community and school levels (European Agency, 2019b). It should also ensure that preventing school failure involves ministries for social care and welfare, health, housing, labour and employment. Joint policies between ministries should aim to reduce inequality and take a rights-based approach to equity and participation.

At national level, ministries must monitor developments and act to increase capacity and give real decision-making and management power, together with appropriate levels of funding, to lower levels (Bernbaum, 2011). The roles and responsibilities of staff working in ministries of education must be clear, with relevant training to ensure they have the

capacity to carry out their roles. It is also important to ensure that there is no duplication in the division of roles between different system levels.

In supporting local communities and schools to implement inclusive policy and practice, governance is 'a balancing act between accountability and trust, innovation and risk-avoidance, consensus building and making difficult choices' (Burns, 2015, p. 4).

Köster (2016) highlights the processes which appear to be most problematic to governance systems trying to implement real-world education reforms: capacity building, accountability and strategic thinking. These processes involve:

- aligning responsibilities to avoid frictions between stakeholders and between policies;

- implementing a constructive accountability system that guides stakeholders towards common goals while allowing responsible risk-taking in the quest to improve;

- supporting actors in adapting policy and using evidence for innovation; and

- building stable practices that enable continuous strategic thinking (Köster, 2016).

The OECD (2023) points out that a lack of co-operation or co-ordination between various sectors and stakeholders can limit improvement, and stresses the need to consider the results of M&E reports (Fresno et al., 2019). Here, collaboration with the research community is necessary. Oliver and Cairney (2019) recommend that researchers communicate their findings to policy-makers in clear language to ensure that the information obtained through M&E is used to inform policy development.

The COVID-19 pandemic heightened the need for co-operation and collaboration both within and across countries. As UNESCO (2021) suggests, collaboration at the political level and between countries can play a central role in the future development of education systems. This may be achieved through activities such as developing (and funding) collaborative networks and platforms, and engaging the non-formal education sector.

Van der Graaf, Dunajeva, Siarova and Bankauskaite (2021) recommend promoting co-operation between relevant actors, both in educational institutions and from the private education sector and other youth organisations, at national level and within the EU. Providing platforms and spaces for co-operation and partnership would allow them to benefit from shared experiences and insights (OBESSU & Open Society Foundations, 2021).

Leadership for collaboration

Bryson, Crosby and Stone state that, to support collaboration between professionals/sectors in complex, dynamic, multi-level systems, stakeholders need to:

- design 'processes, structures, and their interactions in such a way that desired outcomes will be achieved and required accountabilities met';

- 'adopt flexible governance structures that can adjust to different requirements across the life cycle of the collaboration' (2015, p. 647).

To achieve such outcomes, strong leadership is needed at all system levels. It must be underpinned by a shared understanding of inclusion to provide all stakeholders with a common purpose (Azorín & Ainscow, 2018).

At school level, leaders clearly play a key role in quality assurance for both accountability and improvement. According to the Agency, school leaders must:

- be able to set out the vision, values and outcomes for which they (and other stakeholders) wish to be held to account (e.g. equity, non-discrimination and meeting all learners' personal, social and academic requirements);

- be held accountable (to learners, families, local community) through mechanisms that are aligned with other policy areas, ensuring support for inclusive education policy and practice;

- play a lead role in monitoring, self-review and evaluation, together with key stakeholders, to provide information on learner outcomes and reflect on data to inform on-going improvement (European Agency, 2021c, p. 5).

Nelson et al. (2015) agree that school leaders are crucial in managing collaborative discussions, allocating resources (including time) and developing a culture that is inquiry- and improvement-oriented. Becker and Smith (2017) note the need for skills in team building, developing trust and managing power dynamics and conflict. They also suggest that leaders should define results and use data to align motivations and ideas, use leverage points and share knowledge and learning.

Agency work (2019a) showed that only a few Agency member countries addressed the role of school leaders in their top-level regulations or provided professional development activities and guidance materials targeting them specifically. This work noted the importance of developing inclusive school leadership as a key policy area for improvement. It emphasised that policy should provide appropriate status for school leaders and enable them to:

- access support – to benefit from opportunities to learn and develop, receive relevant information and have contact with a full range of stakeholders;

- access resources – to develop the school workforce's capacity to support all learners, including those at risk of underachievement;

- have autonomy – to make evidence-informed decisions and follow a course of action in all areas of school policy and practice;

- be accountable – take responsibility for their decisions and provide a clear rationale for their actions (European Agency, 2019a).

At all system levels, cross-sector leadership should recognise the potential of using differences as an asset, i.e. differences in resources, experience, demographics and sectors, as well as differences in perspective. Becker and Smith say: 'Cross sector leaders recognize that the most robust and sustainable solutions will come from designing with (and not just for) the communities most affected' (2017, p. 2).

According to the OECD, there is a need to move from 'leadership for reform and improvement to professional leadership for anticipation and uncertainty' (OECD; Education International; Ministry of Education and Vocational Training of Spain, 2022, in McGrath, 2023, p. 11). Such uncertainty includes 'valuing networked, multi-level learning and the importance of the local' level (ibid.).

This networked and multi-level practice makes the question of accountability more of a challenge due to the:

> … diffuse and ambiguous nature of collaborative arrangements, the changing (contribution of members to) network-level outcomes and the sometimes conflicting expectations of stakeholder and client groups (Ehren & Godfrey, 2017, p. 341).

The next section will discuss these issues.

Collaboration, quality assurance and accountability

The European Commission (2015) notes that a high level of stakeholder involvement in designing and implementing quality assurance at all levels (system, local and school levels) is, in itself, a quality assurance measure.

When all stakeholders take responsibility for the quality of the education they provide and commit to continuous improvement, decisions on policy and policy implementation, including quality assurance measures, are more likely to be put into practice.

> Sharing of expertise and knowledge, and the articulation of different perspectives, increases the chances of reaching balanced and workable decisions on how best to implement a policy (Jones, 2016, in Jie, 2016, p. 22).

Collaboration is mostly based on inter-dependence and mutual trust. As such, accountability in this situation requires more informal (horizontal) accountability dynamics, rather than vertical structures based on laws, rules and explicit standards associated with formal authority and funding (Page, Stone, Bryson & Crosby, 2015).

Participants from different sectors and agencies vary in terms of sources of control and power, organisational context and preferences for collaborative outcomes. Consequently, stakeholders may face conflicting expectations from others. Differences may arise

between vertical and horizontal accountability, formal and informal accountability, and short- and long-term outcomes (Koliba, Mills & Zia, 2011; Page et al., 2015; Romzek, LeRoux, Johnston, Kempf & Piatak, 2014; Saz-Carranza & Longo, 2012). In acknowledging these tensions, accountability relationships will include both formal agreements and informal norms and expectations (Lee & Ospina, 2022).

An important consideration for leaders and decision-makers then is 'how accountability mechanisms can be designed to strengthen' networks and support collaboration (Ehren & Perryman, 2017, p. 7), allowing network members to:

> … respond quickly to local problems, professionally scrutinize and share local solutions and ensure that school collaboration is not just an 'end in itself' but successfully contributes to improvement of education and student outcomes, even in challenging circumstances (ibid., p. 14).

Tensions can arise between 'tightly controlled accountability mechanisms which seek to minimise risk and error' and 'the fundamental purpose of network governance to allow stakeholders to flexibly respond to local context and collaborate on the basis of trust' (ibid., 2017, p. 4). Ehren et al. (2017) stress that, if accountability is to become a tool for learning and improvement instead of control, high levels of reciprocal trust are needed, along with shared responsibility and endeavour. Ehren and Godfrey (2017) suggest that countries moving towards such a model need to rethink their education accountability policy and consider these complexities, inter-dependencies and dynamics.

Ehren and Godfrey further recognise that single-member accountability tends to support hierarchical control. They state that traditional top-down models of accountability may have difficulty in 'disentangling how being in the network has impacted on the performance of its individual members, or to what extent each member has contributed to network-level outcomes' (ibid., p. 341). They note the need to find solutions to the problem of how vertical accountability mechanisms can complement and reinforce horizontal accountability mechanisms (see also Klijn & Koppenjan, 2014). Accountability, therefore, should not be built on standardised pre-set frameworks but, according to Klijn and Koppenjan (2014) and Papadopoulos (2014), should accept multiple standards and indicators and support the development of peer accountability and network homogeneity.

Other researchers have noted the potential for further conflict where governments provide funding and set the legal framework, and stakeholders have to account for funds and legal compliance in a vertical process (Ehren & Godfrey, 2017). Here, horizontal processes, such as meeting professional standards and seeing quality in terms of parental requirements or labour force needs, may be more closely aligned to an improvement rather than an accountability culture.

When networks' objectives result from 'fragile compromises' between partners with different political, social and economic aims, Janssens and Ehren (2016) see problems arising. This is because partners are uncomfortable being held to account for issues over which they do not have complete control. Differences in stakeholder groups' views and interests need to be resolved through consultation and dialogue so that quality assurance is not seen as imposed in a 'top down' fashion (OECD, 2013).

At school level, too, leaders can only be held accountable for school results if support is provided to help the school to improve. Elmore (2006) terms this 'reciprocal accountability'. Such accountability practices are likely to be effective in systems with trust in results, fair evaluation and organisational learning capacity, in which various accountability mechanisms are aligned (Skedsmo & Huber, 2019).

Hudson concludes that:

> There is no perfect system of accountability, nor is there one which will eliminate all risk … But a price will be paid if too many rules, regulations and procedures are put in place in search of an extra ounce of assurance (2016, p. 34).

This is supported by the OECD (2023), which agrees that quality assurance activities require a shared mindset of evaluative thinking. This mindset, according to Golden (2020), means engaging in critical enquiry, questioning assumptions and seeing mistakes as a necessary part of the learning process – working together and keeping in mind that 'isolation is the enemy of improvement' (Elmore, 2004, in McGrath, 2023, p. 12).

Synthesis of key issues for further discussion

The research reviewed in section 2 shows that collaboration is widely recognised as a key factor in implementing inclusive policy and practice. For example, the Agency states the need for:

> Structures and processes to enable collaboration and effective communication at all levels – between ministries, regional- and local-level decision-makers and between services and disciplines, including non-governmental organisations and schools (European Agency, 2021a, p. 20).

This section reviews the importance of a 'culture of collaboration' in and around schools, which can benefit both staff and learners. It develops positive and trusting relationships among all staff, learners and families. Collaboration beyond the school can bring further benefits, such as the efficient use of cross-sector expertise and services and extended opportunities for learners in partnership with the local community.

An ecosystem model is discussed as a basis for understanding the main structures and processes that impact on learners at different system levels. This supports consideration of the wider policy context in which schools operate. It can also be used to study collaboration across and between system levels to highlight potential implementation challenges.

The potential of school-to-school networks in providing support for learners and staff and sharing expertise is discussed – emphasising the benefits of collaboration rather than competition. However, such networks require co-ordination and local-level services can play a key role in coherent and targeted support for schools, bringing stakeholders together with a focus on school improvement.

At national level, too, ministries need to co-operate to ensure consistent policy approaches and co-ordination to support better integration of services both vertically and horizontally throughout the education system.

Finally, the need for strong, inclusive leadership at school, local and national levels is stressed. The impact of collaboration on quality assurance and accountability is also considered, emphasising the need for a shared mindset and noting that 'isolation is the enemy of improvement' (Elmore, 2004, in McGrath, 2023, p. 12).

The following issues are identified for further discussion in taking forward the development of a multi-level, multi-stakeholder quality assurance, monitoring and accountability framework.

Research shows the importance of a 'culture of collaboration' in and around schools. In turn, this supports the key role played by cross-sector working, particularly for learners needing additional support. Different services should work as an integral part of school teams to identify needs and ensure high-quality provision.

Local/regional university researchers can provide support for school M&E. They can share knowledge and help to ensure that innovations are effectively implemented and evaluated, with efficient use of data to ensure continuous improvement.

Decentralisation can bring quality issues closer to the stakeholders in local communities. However, it creates complex webs of relationships which often rely on 'softer' modes of co-operation between different stakeholders and can impact on policy co-ordination and accountability. This highlights the need for effective co-ordination at local level, with collaborative and mutually supportive (not competitive) school networks and targeted support to build capacity for self-review and on-going improvement.

The COVID-19 pandemic has shown the importance of co-ordinating policy interventions across sectors. However, in many countries, governments' responses have shown a 'lack of policy integration, both across policy areas'/sectors and across levels of government (United Nations Department of Economic and Social Affairs, 2021, p. 1).

Long-standing norms, traditions and working cultures can hinder the transition from 'siloed' service delivery to new ways of co-operating between education and other sectors (Patana, 2020). As inclusive education similarly requires work across ministries and sectors, as well as across system levels, a priority issue is to develop effective cross-sector working at all levels. This includes developing an M&E framework that will contribute to more equitable access to quality services and a shared approach to quality assurance, accountability and improvement.

Developing infrastructure to facilitate collaboration and implementing protocols for co-ordination and communication require strong leadership at all system levels. Leaders need support to manage these challenges along with varying stakeholder expectations and, in particular, to use data effectively for accountability and improvement.

Collaboration means that decisions on quality assurance are more likely to be put into practice. However, accountability cannot be imposed on any one group of stakeholders, as they may not have control over the resources, processes and/or outcomes that are essential for improvement (Adams et al., 2017). 'Shared accountability' can create an 'environment in which all participants recognize their obligations and commitments in

relation to each other' (ibid., p. ix). This requires a move away from hierarchical control to build trust and ensure all stakeholders' voices are listened to. Genuine stakeholder engagement is needed to provide them with professional legitimacy and empower them to make decisions (Radó, 2010).

Overall, as Smith and Benavot (2019) point out, externally driven accountability that causes competition between schools/stakeholders undermines the trust that is so essential. It does little to raise learning levels or reduce equity gaps (Lingard, Sellar & Lewis, 2017; UNESCO, 2017a). Accountability and quality assurance mechanisms based on shared responsibility and stakeholder engagement are more likely to support real gains in education – and particularly in inclusive education – as 'the process of collaboration itself reflects what inclusion is all about' (Adams, Harris & Jones, 2016, p. 67).

SECTION 3 – DEVELOPING A FRAMEWORK FOR INCLUSIVE EDUCATION

Sections 1 and 2 discussed M&E in schools and at local and national levels and considered the key role that cross-sector collaboration plays in inclusive practice and quality assurance for accountability and improvement. Section 3 will examine the key issues raised in previous sections and suggest some potential ways forward. These include the development of a model for a multi-level, multi-stakeholder quality assurance, monitoring and accountability framework for inclusive education. This framework aims to support the implementation of inclusive policy and practice.

The development of a quality assurance framework for accountability and improvement must align with international, as well as EU-level and national-level, commitments. It must be applicable to the full range of stakeholders across education and other sectors that impact on the provision of high-quality inclusive education for all learners. This section will attempt to develop a model for monitoring, evaluation and quality assurance to address co-ordination, coherence and collaboration issues across sectors and system levels, the lack of which can inhibit efficient provision.

As stressed throughout this review, only a small number of countries map information gathered against education system objectives to plan further data collection activity (UNESCO, 2016). Moreover, only about one in ten education reforms in OECD countries is followed by any attempt to evaluate its impact (OECD, 2015d).

A multi-level, multi-stakeholder framework requires commitment to close co-operation and policy alignment at higher levels of government. It also requires guidelines and resources to support implementation with the engagement of all stakeholders to improve outcomes (European Commission, 2015; Patana, 2020).

Summary of issues raised in sections 1 and 2

A culture of collaboration is a prerequisite for high-quality inclusive education. It can support reflection among all stakeholders and support self-evaluation, taking a range of perspectives into account. Such a culture will also support positive relationships across the school and community and ensure that inputs from other professionals (in sectors other than education) are fully accepted and integrated into strategies to support all learners. Collaboration across system levels and across sectors and services can be seen as taking place within an ecosystem which can support examination of the policy context influencing learners – including the development of effective monitoring, evaluation and quality assurance to secure on-going improvement.

The culture or ethos within a school to facilitate collaboration requires strong leadership to establish a vision, develop inclusive values and build capacity for high-quality practice, particularly regarding use of data and information for improvement. This will include effective formal and informal teacher assessment – beyond test/exam data – to reflect the wider achievement of all learners. It will also draw on self-evaluation, outcomes of external school evaluation, staff appraisal and professional dialogue to develop the

confidence and competence of all staff and other stakeholders, with a focus on continuous improvement rather than high-stakes accountability. The learners' best interests should always remain at the centre of the ecosystem.

External advisers and researchers can work to increase the capacity for monitoring, evaluation and improvement at local level. Here, the involvement of wider stakeholder groups in M&E processes can further ensure quality. Stakeholders will include learners, families, community members and peers from other schools and/or local/municipal-level professional staff. These staff working at local level can provide effective co-ordination through collaborative and mutually supportive (not competitive) school networks and targeted support to ensure on-going improvement.

At national level, information from a range of processes and mechanisms at school and local levels can be used to generate country data on learner, teacher and school performance. Disaggregated data is required to highlight gaps in learners' opportunities and outcomes and to monitor policy to address priority issues. This data should inform future developments, ensuring attention to learners' rights both to and within education, particularly looking at the evidence around different causes of exclusion. Any categories used to disaggregate data should not inadvertently become grounds for segregation or a means of controlling access to resources.

Qualitative and quantitative indicators developed at national level should be consistent across other system levels but retain some flexibility to be adapted to local and school contexts. All indicators should be informed by a coherent, widely agreed view of what high-quality inclusive and equitable education looks like.

Effective cross-sector working by stakeholders at all levels must support leaders with monitoring, evaluation and quality assurance processes and mechanisms that move away from hierarchical control to build trust and ensure that all stakeholders' voices are included.

Addressing key issues in monitoring, evaluation and quality assurance in collaborative contexts

In addressing the issues outlined above, several strands of policy and practice can be identified. Maxwell and Staring (2018) stress the inter-dependency of these strands that need to be woven together to form an integrated strategy. Evidence from all these strands of quality assurance activity must combine to provide a balanced view of development at school and system levels.

While most countries have policy and practice in place for these key areas, few, if any, have a coherent model where the strands are 'mutually supportive, exploiting to the maximum the positive synergies that exist between them' (ibid., p. 29). In such a model, careful attention is needed to manage any tensions within and between different policies and processes, to ensure consistency with the 'shared European vision on the breadth of competences young people need to develop, and the culture which is needed for quality improvement to thrive' (ibid.).

To implement such a coherent model, countries should develop policy and practice in the following areas:

- A long-term vision for inclusive education, shared with stakeholders to inform system goals

- Legislation and policy to support an inclusive education system, aligned to the agreed vision to ensure consistency across policies and a coherent approach to quality assurance and accountability, agreed with stakeholders

- Strategic implementation plans to enact the vision, clarify roles and responsibilities across stakeholders at different system levels and provide meaningful indicators to support the monitoring of progress

- Coherent quality assurance activity in schools, including self-evaluation, external evaluation, staff appraisal, learner assessment (formal/informal) and collaboration and consultation with stakeholders (from all sectors and across the local community)

- Supportive networks at local level between schools, municipality/local area support staff, cross-sector teams, etc., focused on developing the community's capacity to share and use data and information and take action for improvement

- Effective national-level M&E drawing on school- and local-level summative data to examine fulfilment of learners' rights and issues around equity and inclusion, and feed back into the policy and legislative review cycle, sharing responsibility with other sectors and ministries.

These areas will now be discussed in more detail.

A long-term vision for inclusive education

Any long-term vision must be shared with stakeholders to inform system goals. One important enabling factor to ensure that evaluation leads to school improvement is aligning views and beliefs on what constitutes a 'good education' and finding a common language between the evaluators and schools (Ehren et al., 2013). This impacts on all aspects of practice, including M&E and quality assurance systems, which, in most EU school systems, lack processes to assess changes in practices and behaviours. This prevents systems' ability to 'critically reflect and determine levers to activate to improve the quality of relevant areas of school education' (ibid., p. 15).

Important here is the involvement of the full range of stakeholders, as:

> When multi-party deliberations are applied to education, their impact is palpable: better aligned and consensual aims, less reliance on temporary responses by strongly vested actors, and accountability which is less fractured and more coherent (Smith & Benavot, 2019, pp. 201–202).

Providing space for structured democratic voice, where diverse education stakeholders are provided with organised opportunities to articulate their views, also highlights shared responsibility and the inter-connectedness of actors. It recognises that 'accountability actions are part of a broader and longer process of engagement between actors and the

state' (Dewachter, Holvoet, Kuppens & Molenaers, 2018, p. 168). Furthermore, it helps avoid incoherence across responsibilities while promoting ownership of the larger education goals (Fancy & Razzaq, 2017). Finally, it is crucial to ensure that any stakeholder selection and engagement processes are transparent and include all voices (Looney & Kudelova, 2019).

In 2022, Agency member countries re-affirmed the Agency position on inclusive education systems:

> The ultimate vision for inclusive education systems is to ensure that all learners of any age are provided with meaningful, high-quality educational opportunities in their local community, alongside their friends and peers (European Agency, 2015, p. 1).

This should form a starting point for further dialogue.

Legislation and policy to support an inclusive education system, aligned to the agreed vision

Laws and policies must align with the agreed vision of an inclusive education system. This will ensure consistency across policies and a coherent approach to quality assurance and accountability that engages all stakeholders.

The Agency's Key Principles note that, within countries, a single legislative and policy framework for all learners should align with key international and European-level conventions and communications (European Agency, 2021a). The Key Principles also recognise the need for:

> A comprehensive quality assurance and accountability framework for monitoring, review and evaluation that supports high-quality provision for all learners, with a focus on equitable opportunities for those at risk of marginalisation or exclusion (ibid., p. 16).

As part of this cycle of monitoring, evaluation and continuous improvement, decision-makers (along with stakeholders) need to consider legislation and policy in two ways to help inform consistency:

- Retrospective – looking back to examine content, and how laws and policies got on to the agenda and were initiated and formulated. Retrospective action also includes M&E to assess, for example, the extent to which the policy achieved its goals.

- Prospective—looking forward and trying to anticipate what will happen if a particular law or policy is introduced. This feeds into strategic thinking for the future (Jie, 2016).

A coherent approach to quality assurance can use the ecosystem model (see section 2) to explore different stakeholders' roles and responsibilities and the interactions between the main structures and processes that influence learners.

The quality assurance system will benefit from well-resourced studies in education, with clarity around definitions and standards of what constitutes high-quality research (OECD,

2022a). It will also benefit from political will to adhere to evaluations and act on evidence across different administrations (Golden, 2020), even if outcomes are published at an inconvenient time in the political cycle (Bamber & Anderson, 2012). The benefits of integrated services are often only seen over the long term, so, as well as political commitment, changes in service delivery across levels will also require long-term financial investment (OECD, 2015c).

Strategic implementation plans to enact the vision and clarify stakeholders' roles and responsibilities

Strategic implementation plans should clarify the roles and responsibilities of all stakeholders at all system levels and provide meaningful indicators to support progress monitoring. To enact the vision, communication and co-ordination between agencies and between levels are crucial (UNESCO, 2016). It requires a framework that integrates reporting processes to monitor policy recommendations, and consistent and timely implementation to reduce risk of duplication and ensure attention to all priority areas (ibid.). Using technology may help to develop systematic mechanisms across settings and agencies, as well as vertically across levels (ibid.).

Policy implementation requires both top-down and bottom-up approaches. There is no single or generalised theory of policy implementation, as the 'unique social, cultural, economic, and political contexts' affect policy reform in different communities (Jie, 2016, p. 28). However, mutual feedback and dialogue across system levels are essential. In short, a 'connected' strategy for system development is needed to link national and/or regional and school levels (Downes, 2018, p. 1462) and develop trust among stakeholders that can reduce the likelihood of opportunistic behaviour. Trust also increases the chances that stakeholders will invest resources in co-operation and in developing and maintaining relationships. This, in turn, will help the search for innovative solutions and exchange of ideas (European Commission, 2018a) and further improve the chances of successful implementation.

Successful implementation also depends on the skills of school leaders, who tend to have an important role in quality assurance. They act as facilitators to support other stakeholders' active participation and define roles and responsibilities as part of quality assurance measures (European Commission, 2015).

Section 1 of this review discusses the development and use of indicators. Here, consistency is needed between indicators at national and regional levels and those at school and institution level (Downes, 2018). Consistency is also needed across sectors. 'A wide range of expertise and interventions are needed from different sectors … to fully address the complex and multifaceted causes of education exclusion' (UNICEF & UIS, 2016, p. 81).

Some researchers have criticised approaches that use benchmarks, indicators and targets as 'governance by numbers'. However, others (e.g. Burns & Köster, 2016) recognise the need for strong accountability that balances regulation and evaluation with excellence and equality. According to these authors, accountability systems need to 'keep a clear focus on achievement and excellence, while being nuanced enough to allow for innovation, creativity and a rounded learning experience' (ibid., p. 24).

In short, accountability systems relying on compliance are insufficient. A wider vision is needed, supported by trustworthy data, information and infrastructure – with the involvement of stakeholders. As Adams et al. make clear:

> A broader spectrum of indicators, going well beyond a summary of annual test performance, seems necessary to account transparently for performance and assign responsibility for improvement (2017, p. vii).

Coherent quality assurance activity in schools

Quality assurance activity in schools should include self-evaluation, external evaluation, staff appraisal, learner assessment (formal/informal) and collaboration and consultation with stakeholders (from all sectors and across the local community).

A range of such activities is needed, given the complexity of school education systems, which vary widely across Agency member countries. Likewise, the quality assurance mechanisms that steer these systems vary. However, the European Commission found that, in most EU countries, quality assurance (QA) systems are not sufficiently consolidated, noting that:

> … the coherence and strategic linking of various QA activities (e.g. teacher or pupils' assessments, school evaluations, … definition of learning outcomes) is insufficient, formative activities and processes are generally limited and there are shortcomings in the QA of certain areas of education (which can have an impact on the QA of other related areas) (2015, p. 13).

A European Commission study (2015) found that, in most EU countries, the school sector does not use the term 'quality assurance' as such. Stakeholders consulted in the study:

> … tended to know specific QA activities or processes (e.g. external school evaluation or inspections, internal evaluation, teacher appraisals) without … referring to them … or understanding them as part of a QA system or approach (ibid., p. 12).

Nonetheless, such activities exist in all EU school systems. Re-labelling existing activities as quality assurance processes and considering how they interact could further support their 'use for accountability and improvement purposes' and integrate them as part of a quality assurance system or cycle (ibid.).

The availability of quality, user-friendly performance and context data at school-level, and the training and capacity building of school-level stakeholders to use this data, are also key factors in implementing effective quality assurance (European Commission, 2015).

As discussed in this review, a range of qualitative and quantitative data needs to be analysed, interpreted and used, to create a holistic picture of school and learner performance and to develop clear strategies for school development by the full range of motivated and engaged stakeholders.

UNESCO (2016) observes that while data should be analysed as close to collection points as possible, data collected by schools/local communities is rarely analysed at these levels. This can limit opportunities for dialogue with stakeholders which would, in turn, increase

feelings of ownership and involvement. On-going reflection on data is also needed to ensure adjustments are made as early as possible, reducing the impact of ineffective initiatives on learner progress.

As a quality assurance measure for school self-review, external evaluation or inspection can look deeper into schools. A synergy between external and internal quality assurance provides more resilience to cope with the increasingly complex change processes taking place in national education systems (European Commission, 2017).

Bringing a range of views and measures together to form a judgement as part of an inspection or external evaluation requires a 'deliberative, rather than an algorithmic, process' (Schneider & Gottlieb, 2021, p. 471). Such deliberations could include information produced by formal (hard and soft) measures, together with inspectors' observations and the first-hand knowledge of participants – local officials, administrators, teachers and employees, community members, parents and learners (ibid.). To safeguard against personal preferences or loss of objectivity of individual school inspectors, Ehren and Perryman (2017) explain that standardised and centralised frameworks are needed to enhance the accuracy and comparability of the judgements.

As collaboration is a key factor in developing inclusive practice and trusting relationships among all stakeholders, training and support in building effective and sustainable partnerships is required. Lack of training has been identified as a major barrier (Kaga, Bennett & Moss, 2010; Lawrence & Thorne, 2016) and all partners need to be recognised for their efforts (Patana, 2020).

Supportive networks at local level

Local-level networks may include schools (from all sectors), municipality/local area support staff, cross-sector teams, etc. All partners should focus on developing the community's capacity to share and use data and information and take action for improvement.

Generally, data (e.g. on learner achievement, drop-out, learner-teacher ratio) is organised at the school level. This will need re-organisation to fully represent the performance of a multi-school, multi-stakeholder network. Strategies and/or mechanisms to respond to data and information will also need to be re-considered. Kania and Kramer (2011) explain that collecting data and results consistently on a short list of indicators at the network level and across all participating organisations ensures that all efforts are aligned. It also enables participants to hold each other to account and learn from each other's successes and failures (Ehren et al., 2017).

External evaluation and inspection of networks require attention to the quality of collaboration and the contributions of different partners. Here, local control and a high level of trust are needed as all stakeholders develop the capacity and expertise to take on the additional responsibilities brought about by increased autonomy and local networking.

At local level, separate traditions and cultures and the silo working practices of different agencies/sectors need to be addressed to ensure better integration of services, with co-ordinated standards and information (Patana, 2020). Communities must be prepared for such initiatives to develop a shared understanding of the possible benefits (de Hoop

et al., 2019; Seelos & Mair, 2016). Again, strong local/regional leadership will be needed to support implementation. The leaders must understand the local context as well as broader societal factors and, through on-going M&E, be able to identify barriers which may hinder implementation and upscaling of local initiatives (Seelos & Mair, 2016).

Effective national-level monitoring and evaluation drawing on school- and local-level summative data

National-level monitoring should examine the fulfilment of learners' rights and issues around equity and inclusion. Information should be fed back into the policy and legislative review cycle and shared with other sectors and ministries that also bear responsibility.

The European Commission (2015) observes that, in several countries across Europe, system-level actors face difficulties in formulating or ensuring effective implementation of quality assurance policies or activities. This may be due to insufficient performance monitoring of certain areas of school education or of the effectiveness of quality assurance in maintaining and improving quality. Other causes of poor implementation of quality assurance activities may be weak information, information not being used for further improvement, or school leaders and teachers who lack the professional development, capacity or incentives to implement activities and use results.

Countries usually have different elements in their legal frameworks for governing schooling that have developed over time. These lead to different types of evaluation within the system, rather than a coherent framework (European Commission, 2015). Even where specific legal frameworks govern the external evaluation of schools and learner assessment, evidence can feed into the evaluation of the whole system. However, no country appears to have an overall system for quality assurance that links levels, sectors, etc. (UNESCO, 2016).

The European Commission (2015) study found that the system weaknesses in member states broadly related to:

- poor consolidation with a lack of clearly defined dimensions as the focus of quality assurance;
- lack of clear indicators to measure attainment of quality standards;
- failure to organise quality assurance activities and processes into a cycle;
- failure to include a formative function geared towards continuous improvement.

These 'lacks' highlight the need for 'intelligent accountability' (O'Neill, 2013) based on inclusive approaches, that have regard for professional responsibility (Cochran-Smith, 2021). These would ensure that external accountability at all levels supports the culture and conditions for strong internal accountability (Fullan, Rincón-Gallardo & Hargreaves, 2015).

Overall, as Golden (2020) notes, many countries have M&E units but they often operate in silos, with management and information systems working independently of policy analysis. As at local level, data collection by different agencies and service providers requires integration at both informational and infrastructural levels to co-ordinate data and evaluate outcomes.

This section has highlighted some key challenges and issues to be considered in developing a multi-stakeholder, multi-level quality assurance model. A further consideration is the values and principles that will underpin such work.

Summary

Six key issues for monitoring, evaluation and quality assurance in collaborative contexts have been discussed.

Legislation and policy development needs to be informed by a clear, long-term vision of an inclusive education system, agreed with all stakeholders, in particular ensuring that the voices of 'hard-to-reach' stakeholders are fully included.

Agreement across stakeholders, sectors and system levels is essential to ensure a consistent approach to all quality assurance activities. Such activities should also be supported by the identification of clear roles and responsibilities, and indicators which can be used to support implementation plans and monitor progress.

The impact of inclusive policy and practice is most evident at school level. As such, a range of M&E activities with both internal and external stakeholders is needed to fully understand the context of every school and use information to support improvement. This work also requires support from local networks, including other schools, community members, local area/municipality staff and professionals from various sectors and services. A range of perspectives will benefit school development and, in particular, support the effective use of information and data.

Finally, effective communication within and between levels should facilitate the synthesis and analysis of all information and data. This will show the extent to which all learners' rights to – and within – education are being fulfilled within a high-quality, inclusive and continuously improving system.

Underpinning principles and essential requirements to develop a model framework

The research reviewed in sections 1 and 2 focuses on key issues to be considered in developing policy and practice for monitoring, evaluation and quality assurance across system levels and across sectors. These have been summarised above, along with some potential ways forward. Such work should, however, start with stakeholder agreement on underpinning values and principles.

Above all, there is a need to ensure that any quality assurance and accountability framework is inclusive. According to Save the Children, M&E should be:

- 'functionally inclusive', collecting information about the inclusiveness of policy and practice with inclusive indicators and disaggregated data;
- 'methodologically inclusive', allowing people usually excluded from M&E processes to participate;
- 'operationally inclusive', with a data collection process that contributes to fostering inclusion, e.g. information from participatory assessments on the

inclusiveness of schools is 'shared back to the community to increase awareness' of exclusion (2016, p. 29).

The end goal should be an inclusive education system with a model of teaching to diversity that recognises and values each learner's unique identity (Mezzanotte, 2022). Such a model requires the integration of input from sectors other than education.

Hudson (2016), working in the health sector, set out some key components of an 'integrated' approach to accountability appropriate for cross-sector working. The components most relevant to the current work are:

- 'a single set of outcome indicators', comprising 'some key national indicators, plus a set of local indicators agreed by the relevant parties'

- 'a coordinated approach to planning at local level, including how planning and monitoring for individual organisations fits within this strategic … approach'

- 'a high level financial plan also agreed at local level'

- 'a common database for headline performance measures that is available to the public' (ibid., p. 3).

Adams et al., again with a focus on shared accountability, suggest that state, district and school leaders must create a systemwide culture grounded in 'learning to improve' (2017, p. xi) and that multiple indicators of capacity for improvement (for example, effective use of data) should be added as part of every school profile. Accountability should enhance all education partners' capacity to fulfil their clearly defined roles and responsibilities and lead to sustained system improvement. However, stakeholders should only be held accountable for the areas of the system within their authority and expertise.

Downes et al. (2017), in their work on indicators, set out some principles for inclusive systems. These have been adapted, drawing on the research in this review, to create the following requirements:

1. A system-wide focus on connection and collaboration across the whole school community, moving from a primary focus on resilience of individuals, to one that examines inclusive systems of support for resilience (Ungar, 2012, in Downes, 2017). This focus on cohesion and co-operation may help to address system blockages and enhance system supports (European Commission, 2018a).

2. Attention to equality and non-discrimination, aligning to EU and international conventions and communications. The concept of intersectionality should be used to explore the ways in which policies consider the interaction of different identities to form unique meanings and complex experiences within and between groups in society (Palència, Malmusi & Borrell, 2014). All stakeholders' capacity should be developed to make best use of quality assurance data and information for innovation and school and system improvement (European Commission, 2018a).

3. A commitment to every learner's right to expression and participation and other educational rights. This involves meeting EU and international commitments, particularly the UN Convention on the Rights of the Child and the UN Convention on the Rights of Persons with Disabilities, listening to concerns that directly affect learners' welfare, with regard to their ages and maturity.

4. A holistic approach that recognises learners' social, emotional and physical needs, as well as academic and cognitive needs. This would, according to Hevia and Vergara-Lope (2019), include:

    -   broad and fair criteria for assessing the success of education policies (beyond the outcomes of standardised tests);

    -   using various evaluation methodologies and results to generate formative feedback;

    -   considering aspects such as learner characteristics and socio-economic factors that impact on educational outcomes and that may be beyond the influence of schools and teachers.

    This is consistent with the principles outlined by the European Commission (2018a). These stress the need for 'different data for [a] balanced view' of school development and learner progress (ibid., p. 3) and the importance of ensuring that stakeholders see that evaluation primarily aims to support school development.

5. Recognition of the need for multi-disciplinarity. Here, a range of professionals from different disciplines collaborate to provide for the multi-faceted needs of all learners. Networking between schools and with local and wider communities can share expertise, building social and intellectual capital (European Commission, 2018a).

6. Representation and active participation of marginalised learners, parents and other stakeholders. Processes and structures should be in place to ensure their involvement, building relationships based on mutual trust and access to local information and decision-making fora (Hevia & Vergara-Lope, 2019).

7. A focus on active, lifelong learning across formal, informal and non-formal education for citizenship, personal and social fulfilment, and intercultural dialogue across communities, to increase social inclusion and employment.

Building on these principles and requirements, the next section will draw on the learning from this review to draft a multi-level, multi-stakeholder framework for quality assurance and accountability – with a focus on continuous improvement.

CONCLUSION: TOWARDS A DRAFT FRAMEWORK

The research in this review has established that few, if any, countries have a coherent system for monitoring, evaluation, quality assurance and accountability. It has also stressed that, in a culture of continuous improvement, quality assurance plays a vital role. This section presents a draft multi-level, multi-stakeholder quality assurance, monitoring and accountability framework.

The European Commission identified a quality assurance system as:

> … an integrated set of policies, activities, procedures, rules, criteria, tools and verification instruments and mechanisms that together are designed to ensure and improve the quality provided by a school institution or school system (2015, p. 12).

According to the Commission, these instruments and mechanisms should 'build on each other in a consistent manner' and 'be organised according to a quality assurance cycle, to realise continuous improvement' (ibid., pp. 12–13). Most important is 'clarity in the communication of the goals, procedures and expected outcomes' of quality assurance measures, 'built on a fluent dialogue between school-level and system-level actors' (ibid., p. 15).

In an increasingly complex education system, multiple types of data are needed to give a rounded picture of system and school development. Quantitative data provides more uniform and comparable measures of outcomes and statistical correlations, and qualitative data examines the processes underlying such hard data (Education Evaluation Centre/Te Ihuwaka, 2021).

When they exist in parallel, therefore, qualitative data can add meaning to quantitative data and support the understanding of wider stakeholders, in a triangulation process. Countries need to consider the tools, processes and level of detail needed for internal and external quality assurance and for broader dissemination. To improve the validity and reliability of quality assurance, systems should also consider the 'weight' given to different mechanisms and how measures can work together to increase synergy (European Commission, 2018a).

To guide the development of a quality assurance system that will support on-going improvement, this section now presents a working multi-level, multi-stakeholder model for quality assurance and accountability. This model will enable governments to 'have the information they need … to focus their activities and meet their targets, while at the same time ensuring rights holders are able to claim their rights and hold governments to account', in line with EU and international commitments (UNESCO, 2017c, p. 27).
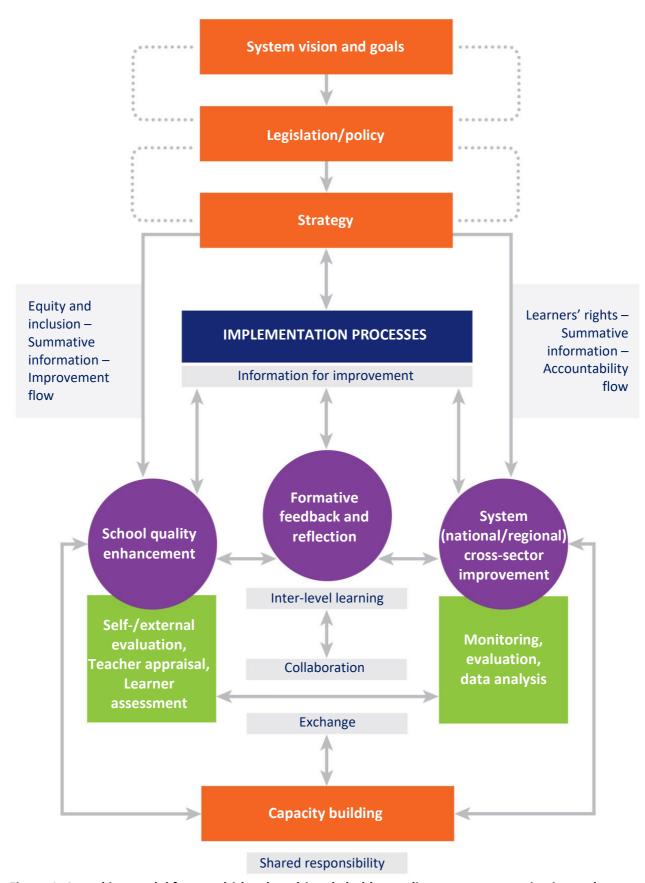
Figure 1. A working model for a multi-level, multi-stakeholder quality assurance, monitoring and accountability framework

UNESCO (2016) suggests the following elements are required for M&E. As outlined in the text below, these can be 'mapped' onto the model to support the development of effective links and information exchange – and, ultimately, use of information for school and system improvement.

- **School record-keeping system** (supports school management, covering input, process and output). Within the draft model, this could comprise data and information from school self-evaluation, including on learners (enrolment, attendance, academic achievements through teacher and external assessment, etc.), teachers (profile of teachers' training, qualifications), finance (school budget and expenses) and physical facilities (quantity and quality of school buildings, classrooms, furniture, equipment, etc.). Usually, information from such systems is consolidated and fed into other M&E systems, such as education management information systems.

- **Statistical data system/education management information system** (input for policy and programmes at different administrative levels with a focus on input). This is designed to collect, collate and analyse school-level information and data as set out above, for policy and programme formulation, implementation and monitoring at different administrative levels.

- **Resource management systems** (ensuring efficient investment in education with a focus on input). These could include teacher management – recruitment and deployment, and financial resource management – recording transactions and monitoring financial status of institutions. In line with the model, this could also include cross-sector working across system levels.

- **Performance evaluation system** (measuring results of education provision with a focus on process). According to the model, this may include information from school external evaluation/school inspection to check compliance with rules, regulations and standards set by the relevant authorities, and teacher and leader appraisal.

- **Learner evaluation system** (measuring results of education provision with a focus on output). Within the model, this could draw on examinations designed to certify or select learners, usually focused on the main subject areas in the school curriculum, and assessment by teachers on broader achievements (adapted from UNESCO, 2016, pp. 11–12).

Within each of these elements, attention needs to be paid to equity and inclusion as few (if any) countries can track the progress of the most disadvantaged groups. Information management systems, therefore, need to be improved to include disaggregated data and information on learners' socio-economic and demographic characteristics. It is also important to consider 'how intersecting disadvantages may hinder progress towards access and learning' (UIS, 2018a, p. 128).

The ecosystem model, discussed in [section 2](#), can also serve to develop and monitor collaboration across levels and across sectors. This collaboration will:

- ensure the systematic inclusion of all stakeholder groups in structures and processes influencing school policy and practice and quality assurance for accountability and improvement;

- support leaders/decision-makers to study the potential of the wider community in quality assurance;

- consider where responsibility for key quality assurance structures and processes might lie;

- realise the potential channels for communication and feedback within and between system levels regarding quality assurance activity, ensuring that information is used to inform on-going improvement (including reviews of the policy context at national level) within a culture of trust;

- set work within the wider social, cultural and legislative context, including EU and international commitments.

The model has the potential to be further developed to address some of the challenges identified in this review. It could improve policy and practice in setting goals and measuring progress at both learner and system levels and ensure the transparency of information and data while avoiding the pressure of high-stakes approaches (European Commission, 2017). It is key that the model attends to issues of equity and inclusion as, despite the highest performing education systems being those that put a premium on equity, education is failing to reduce inequalities. The European Commission notes that to 'turn the tide', education and training systems should 'boost the abilities of every individual and enable upward social mobility' (2020b, p. 7).

To achieve this goal and step up the focus on equity in education, coherent quality assurance activities with consistent and effective communication across all stakeholders at all system levels will need to adhere to the underpinning principles and essential requirements set out above.

In short, the framework must be inclusive – in function, methodology and operation – to ensure that work across sectors and levels has common goals and indicators, co-ordinated plans and clear outcomes, agreed with stakeholders who share responsibility within a continuous improvement culture.

A resilient system requires real connections between stakeholders and a focus on all learners with their multiple and intersecting identities. It should give learners and their families a voice through accessible decision-making structures and processes.

Similarly, inputs from a variety of professionals must be valued to ensure that a range of data and information is used to provide a balanced view of schools' development and a holistic picture of learners.

Finally, a multi-level, multi-stakeholder framework must support lifelong learning. It must include co-operation between all sectors of education to prepare all learners for full participation in the community and opportunities for continuing education and employment.

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