
Financing Policies for Inclusive Education Systems

Final Evaluation Report



EUROPEAN AGENCY
for Special Needs and Inclusive Education

FINANCING POLICIES FOR INCLUSIVE EDUCATION SYSTEMS

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Co-funded by the
Erasmus+ Programme
of the European Union

This project has been funded with support from the European Commission.
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The European Agency for Special Needs and Inclusive Education (the Agency) is an independent and self-governing organisation. The Agency is co-funded by the ministries of education in its member countries and by the European Commission via an operating grant within the European Union (EU) Erasmus+ education programme (2014–2020).



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This report has been published as one of the deliverables of the Financing Policies for Inclusive Education Systems (FPIES) project, co-funded by the Erasmus+ Forward-Looking Cooperation Projects initiative.

The Universitat Ramon Llull Fundació Privada, Barcelona, acted as the FPIES Evaluator Partner.

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Extracts from the document are permitted provided that a clear reference to the source is given. This report should be referenced as follows: European Agency for Special Needs and Inclusive Education, 2019. *Financing Policies for Inclusive Education Systems: Final Evaluation Report*. (C. Giné Giné, M. Castelló Badia and C. Mumbardó Adam, eds.). Odense, Denmark

With a view to greater accessibility, this report is available in accessible electronic format on the FPIES project web area: www.european-agency.org/projects/fpies

ISBN: 978-87-7110-865-1 (Electronic)

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PART I. INTRODUCTION

This report contains the results of the project evaluation carried out throughout the Financing Policies for Inclusive Education Systems (FPIES) project. This evaluation's main objective was to provide useful information to guide the project decision-making processes. The specific objectives were to generate and discuss evidence about:

1. the extent to which the project methods and procedures implemented were aligned with the project goals;
2. the meaningfulness of the project outcomes and deliverables for policy-makers and stakeholders;
3. the national and European impact of the project outcomes.

[Annexes 1 and 2](#) contain further information regarding the Evaluation Plan.

To actually respond to these objectives, the evaluation team has been providing the FPIES staff with evaluation feedback, based on the information collected in various meetings, so as to inform the project procedures and decision-making processes.

Data was collected through written narratives, questionnaires and focus groups at different points throughout the project, namely during three Country Study Visits (Norway, Italy and Lithuania), five Project Advisory Group meetings (Brussels, Vilnius, Burnham, Barcelona and Odense) and the final Validation and Dissemination events. In addition, the evaluation team revised the documents that the FPIES staff produced throughout the project.

Two interim reports stemming from the analysis of this data were delivered to the FPIES staff to inform the project development. The First Evaluation Interim Report aimed to display the evaluation plan and the questions leading it, as well as the participants' initial expectations and concerns about the project development. The Second Evaluation Interim Report provided an in-depth analysis of the Country Study Visits (CSVs) and Project Advisory Group (PAG) meetings, offering potential information about the main achievements and challenges of the on-going project.

This Final Evaluation Report provides feedback on the final working meetings aiming to develop, validate and disseminate the project outputs. This current report is organised to present the results regarding the three main evaluation questions presented above. Each section thus outlines the project's main challenges and strengths regarding:

1. the alignment of the methods and activities to the project goals;
2. the meaningfulness of the project deliverables and outcomes;
3. the impact of the project deliverables and outcomes at different levels.

Finally, the [Conclusions section](#) summarises the most relevant outcomes stemming from the overall evaluation of the project execution.

PART II. RESULTS

1. Project methods and procedures

Evidence collected throughout the project revealed some challenges – mainly at the beginning – and strengths regarding how the project’s methods, activities and procedures aligned with the project goals.

1.1. Main challenges

A main challenge regarding the different methods, activities and procedures carried out during the project related to time, which was perceived as limited. Another challenge was the perceived need for aims clarification, in terms of seeking coherence between the planned methods and participants’ expected outcomes. This occurred mainly at the beginning of the project.

1.1.1. Aims clarification

A first challenge in aims clarification related to the project scope and limits. At the beginning, there were doubts due to the complexity and diversity inherent to the construct of ‘inclusive education’ among the national education systems. The FPIES staff addressed these issues in the first meeting and an agreement was reached that dispelled the doubts.

A second challenge that emerged at the beginning of the project related to the need to clarify the aims of the CSVs. This arose from participants’ concern regarding how to collect – and provide – appropriate information about funding mechanisms without having a detailed understanding of each country’s education system. The solution provided by the FPIES staff involved providing detailed schedules and sharing the work during documentation preparation. This was an effective solution, which reduced the workload for the host country and helped to develop systematic and comparable basic information for each CSV.

A third challenge that arose just after completion of the CSVs was the need to clarify the steps and procedures for relating the CSV results to the project outcomes. At the first PAG meeting, the FPIES staff presented a detailed schedule of specific planned activities to achieve the project outcomes on time. This appropriately addressed the partners’ concerns and engaged them to move to the next phase.

1.1.2. Time management

The perception of not having enough time to address the project objectives was a particular challenge regarding the CSVs. During the first CSV, participants expressed doubts that they could appraise a country’s financing system for inclusive education in two days. The FPIES staff quickly responded to this concern by extending the time allocated for the subsequent CSVs to three days.

1.2. Strengths

Some relevant achievements regarding the appropriateness of the methods and activities proposed to reach the project aims must also be highlighted.

1.2.1. Co-ordination mechanisms and work climate

The co-ordination between the FPIES staff and the partner countries has been highly effective. Communication channels and participants' responsibilities have been discussed and clarified from the very beginning. The working methodology, based on promoting partners' reflection among countries, has been appropriate and aligned with the project aims. This methodology has even led to unexpected added value, since the cross-country shared reflections propelled in-depth reflection about own funding mechanisms and education systems. The meetings' efficient work climate has led to positive emerging cross-country relationships primarily nurtured by the FPIES staff, which have fostered in-depth dialogue among participants around the project's main topics.

1.2.2. The peer learning methodology

The decision to include the peer learning methodology both as a method to guide meetings and as a project outcome has led the project team to strive together to overcome common obstacles and reach shared objectives. This has supported the development of a real learning community in which growing and learning have driven the achievement of the project outcomes. This methodology has been a useful and valuable tool to develop a common mindset on the problems analysed and has positively contributed to achieving the project objectives.

2. Meaningfulness of project outcomes and deliverables

2.1. Main challenges

Evidence collected throughout the project revealed some challenges regarding the dissemination of the project outcomes and deliverables.

2.1.1. Dissemination

The local dissemination and use of the tool could be a great challenge for the different countries, as tools and documents need to be translated into the countries' languages to be meaningful for stakeholders. Furthermore, to foster the promotion of the tool and the outcomes of working with the tool, participants and the FPIES staff have suggested adding a chapter explaining the benefits of using the project tools. Some project tools and deliverables have been translated into the languages of the member countries of the European Agency for Special Needs and Inclusive Education (the Agency).

2.1.2. Reaching stakeholders

Moreover, to spread the message about the outcomes' meaningfulness, the Agency could directly inform policy-makers and governments about the project results. The FPIES staff

offered to support dissemination events that could be hosted in the different participating countries.

2.2. Strengths

Some relevant achievements regarding the meaningfulness of the project outcomes and deliverables must be highlighted.

2.2.1. Unexpected impact

Evidence has been collected regarding deliverables developed within the project being useful for each country's internal work, development and reflection. This is a strong added value and it also fosters the dissemination of the project outcomes. Moreover, the Agency Representative Board members' participation in the Scoping Meeting contributed to greater knowledge and involvement of the countries in the project from the beginning and ensured wider dissemination of the results and greater commitment to using the tool.

2.2.2. Fostering reflection processes

The countries' self-review and experience exchange also promoted a shift towards understanding that effective supports must be provided to everyone, not just learners with disabilities. This calls for a change in financing resource allocation and for fairer and flexible financing mechanisms. In this sense, the project outcomes were useful in promoting reflection, discussion and action in inclusive education policies and financing.

For example, the [Project Synthesis Report](#) has gone beyond a mere description of the findings. It offers a comprehensive framework to promote reflection on inclusive education funding mechanisms, thus laying the foundations for the development of the [Policy Guidance Framework](#). This tool, in turn, serves to critically analyse current funding mechanisms for inclusive education. It sheds light on practical ways of reflecting about own policies through the use of the [Financing Policy Self-Review Tool](#).

3. National and European impact of the project outcomes

3.1. Main challenge

Managing the sustainability and exploitation of the project results in the long term is the main challenge, which will mean continuing with dissemination activities. This might include stakeholders who originally participated in the project to thank them for their participation, as well as spread the outcomes to reach other countries and stakeholders.

Participants have proposed other ways of disseminating the project outcomes. These include writing about the tool and its impact in local newsletters, as well as organising conferences or workshops to publicise the project outcomes. In parallel, the FPIES staff suggested disseminating the results at the Agency's bi-annual meeting. This would give member countries the opportunity to become familiar with and learn more about the use of the self-review tool.

3.2. Strengths

3.2.1. Project impact

The [Validation Meeting](#) hosted in Athens, Greece, had a great impact on all the participant countries, which attested to the need for and relevance of the tool. Especially significant was the [Ministerial seminar](#) organised in co-operation with the Greek Ministry of Education regarding its interest in applying the project outcomes. This greatly contributed to the project's dissemination among European stakeholders.

The Dissemination Event took place at the European Council, as part of the '[Towards a European Education Area – Promoting Common Values and Inclusive Education](#)' conference hosted by the Bulgarian Presidency of the Council of the European Union (EU). The presentation of FPIES as an [example of successful policy co-operation and exchange](#) work between countries had a strong impact at the European level. The event was a great opportunity to present the project outcomes to high-level decision-makers from the European Council, Parliament and Commission, and to other conference participants from different EU countries who are committed to the values of inclusive education.

3.2.2. Peer learning methodology

The peer learning approach has proven to have great potential for facilitating self-review and experience exchange among policy-makers from different countries, thus promoting common values and inclusive education among European countries.

PART III. CONCLUSIONS

Taking into account the interim evaluation reports based on evidence collected and analysed during the project, as well as the final outputs and outcomes produced by the FPIES team, the overall conclusion is that the FPIES staff have dealt with the project's challenges appropriately and diligently. They have maintained sustainable and aligned joint work among partners, which, in turn, made it possible to reach the expected aims. Moreover, some collateral benefits, not explicitly stated in the initial project description, were obtained, mainly thanks to the methods and activities carried out throughout time.

The following points summarise the main evaluation report's specific conclusions:

- The working methodology and the procedures and activities throughout the project development have been appropriate and aligned to reach the project aims and keep partners actively engaged in developing their activities and work packages.
- The way in which the activities have been structured allowed reflexive and well-placed policy exchanges between countries on the key characteristics of each financing system for inclusive education, which facilitated the analysis of their challenges and opportunities.
- The FPIES staff have done excellent and proficient work in organising the meetings and CSVs and in fostering a warm and trusting atmosphere among participants that has led to in-depth discussions.
- The peer learning methodology (PLM) has directly and positively contributed to achieving the project objectives by facilitating self-review and experience exchange among participating countries. Such an interactive approach has in itself led to common values and shared understandings around inclusive education among policy-makers from different countries.
- Beyond the project, the PLM has proven to be an efficient methodology for studying complex problems among countries.
- The CSVs were found to have more impact than expected, leading to discussions and reflection processes not only among visitors but also in the host countries' teams.
- The project outcomes and deliverables provide a useful framework for evaluating financing mechanisms and highlighting areas for improvement, thus contributing to building a more effective funding policy. Such tools are information-based materials that facilitate conversations among stakeholders and are intended for effective cross-country co-operation strategies.

- All the participants were satisfied with the project outputs and deliverables due to their potential to promote discussion around criteria, conditions and constraints relevant for inclusive education policies and financing. This, in turn, can facilitate changes regarding resource allocation and the development of fairer financing systems.
- All Agency Representative Board members were involved in the Scoping and Validation Meetings, thus ensuring their engagement and, in parallel, further disseminating the project's impact.

ANNEXES

Annex 1. Evaluation Plan

Project objectives

The FPIES project aims to:

- develop, trial and evaluate a coherent methodology for examining policy issues in European countries;
- conduct a detailed analysis of financing policy issues for inclusive education (IE), leading to the development of policy tools that may be used for developing funding approaches towards IE.

Through these activities, the FPIES project will develop outputs that aim to:

- identify coherent financing mechanisms for IE;
- identify the critical issues that impact upon the effectiveness of funding policies mechanisms towards IE.

Evaluation objectives

1. To conduct an on-going, formative, multi-site, participatory and goal-based evaluation that will inform decision-making and implementation of specific tasks and activities.
2. To examine the process of implementing the various project activities leading to the agreed project deliverables, outputs and outcomes.

Keyword definitions

On-going: The evaluation takes place from the beginning to the end of the project.

Formative: The use of evaluation methods to improve the way a programme is delivered.

Multi-site: Examining a programme, project or policy in two or more sites.

Participatory: All the project stakeholders will be involved:

- Agency country representatives in the Project Advisory Group (PAG)
- Country Analysts
- Agency staff involved in the project
- Country representatives attending the Validation Meeting in 2018
- Policy-makers participating in the Country Study Visits.

Goal-based: The evaluation will focus on the stated project aims.

Evaluation questions

1. Are the methods and procedures implemented in the project coherent and relevant to the stated project goals?
2. Are the project outcomes and deliverables meaningful for policy-makers?
3. Are the project outcomes and deliverables likely to have an impact at national and European levels?

Evaluation milestones and deliverables

Milestones

- Identifying the parameters for the formative evaluation and evaluation criteria.
- Gathering information during project meetings:
 - PAG meetings
 - Working meetings with the Country Analysts
 - Three Country Study Visits
 - Validation Meeting in 2018
 - Dissemination Event in 2018
 - Providing regular evaluation updates to the PAG.

Deliverables

- Two internal, non-public evaluation reports:
 - First interim report: evaluation plan and ‘baseline’ information (Scoping Meeting and information on expectations) presented at the PAG 2 meeting held in Vilnius on 20–21 June 2016. To be delivered in September 2016.
 - Second interim report: Based on interviews, questionnaires and focus groups. To be delivered in September 2017.
- Final Evaluation Report to be delivered after December 2018, following the Dissemination Event.

Methodology

Program evaluation is the application of systematic methods to address questions about program operations and results. It may include ongoing monitoring of a program as well as one-shot studies of program processes or program impact. The approaches used are based on social science research methodologies and professional standards (Newcomer, Hatry and Wholey, 2010, p. 8, Handbook of Practical Program Evaluation).

The methodological approach for the project evaluation will be essentially qualitative. In this sense, indicators will be established and information from all stakeholders must be

collected through various instruments throughout the project; finally, data will be analysed according to the project aims.

Information gathering will cover the following parameters:

Evaluation question 1

- The different stakeholders' initial interests, expectations and concerns
- Implementation of the planning process
- Development of the process and activities
- Quality: whether the needs and expectations have been met.

Evaluation questions 2 and 3

- The meaningfulness of the outcomes and the deliverables for policy-makers
- The potential impact of the outcomes and deliverables at national/European levels.

Indicators/criteria

Refer to [Annex 2](#).

Data sources

- Interviews
- Questionnaires
- Focus groups
- Document review
- Narratives (written stories).

Data collection

Data will be collected using a variety of methods at different stages of the project.

1. At their first meeting after the evaluation plan is discussed and approved, PAG members and Country Analysts will be asked to write a **narrative sheet** accounting for their participation in the project, their initial interests, expectations and concerns.
2. As the project develops in 2016 and 2017, data collection will entail reviewing the key documents produced by project partners. PAG members, Agency staff and Country Analysts will answer short and profile-specific questionnaires. Moreover, focus groups will be held during Country Study Visits.
3. The same process as described above will be carried out during the third year of the project (2018). Furthermore, there will be interviews with policy-makers and other stakeholders involved in the Dissemination Event.

[Annex 2](#) outlines the evaluation questions and characteristics of the objectives, criteria and parameters of the evaluation plan, as well as the instruments used in each case.

Annex 2. Evaluation Questions

1. Are the **methods** and **procedures** implemented in the project **coherent** and **relevant** to the stated project goals?
 - 1.1. What are the stakeholders' initial interests, expectations and concerns at the beginning of the process?
 - 1.2. Are the stakeholders' initial interests, expectations and concerns goal-based?
 - 1.3. Is the planning process well-grounded, realistic and detailed enough?
 - 1.4. Is the planning process well-known and shared by all the stakeholders?
 - 1.5. Is the planning process adequately addressing the expected goals?
 - 1.6. Is the planning process being implemented in a timely manner?
 - 1.7. Are financial and material resources sufficient?
 - 1.8. Is the time allocated to different activities adjusted?
 - 1.9. Do all the stakeholders share progress updates?
 - 1.10. Are activities appropriate and consistent with the goal accomplishment?
 - 1.11. Are the activities efficient?
 - 1.12. Is the work climate adequate for goal accomplishment?
 - 1.13. Do stakeholders feel supported during the process?
 - 1.14. Are there any mechanisms for problem solving and activity regulation?
 - 1.15. How is co-ordination within each country, among countries and with the Agency?
2. Are the **project outcomes** and **deliverables meaningful** for policy-makers?
 - 2.1. How have the results been disseminated?
 - 2.2. Do policy-makers from all countries know about the results?
 - 2.3. Are funding mechanisms/proposals clearly described?
 - 2.4. Are funding mechanisms/proposals solidly grounded?
 - 2.5. Are funding mechanisms/proposals easy to handle?
 - 2.6. Are funding mechanisms/proposals effective?
 - 2.7. Do the funding proposals respect the diversity of countries?
 - 2.8. Are the funding proposals sensitive to the countries' diverse needs?
3. Are the **project outcomes** and **deliverables** likely to **have an impact** at national and European levels?
 - 3.1. What key people in the government know about the FPIES outcomes and deliverables? The Minister? General Directors? (National/European level).

- 3.2. Do policy-makers from all countries know about the FPIES outcomes and deliverables? (National/European level).
- 3.3. Do international organisations (UNESCO; OECD) know about the FPIES outcomes and deliverables?
- 3.4. Are funding mechanisms/proposals clearly described?
- 3.5. Are funding mechanisms/proposals easy to handle?
- 3.6. Is there any initiative to discuss how to reflect the FPIES results to promote changes in legislation and policies for education funding? (National/European level).
- 3.7. Are the key elements of the proposal relevant to the financing of inclusive education?
- 3.8. Are there difficulties/barriers in the financing proposal which hinder the governments of different countries in taking it into account?
- 3.9. Are there difficulties/barriers in the financing proposal which hinder professionals in considering it viable and positive?
- 3.10. Are there difficulties/barriers in the financing proposal which hinder parents in considering it viable and positive?
- 3.11. How is the final output aligned with the EU recommendations and policy documents?
- 3.12. Is the final output aligned with the OECD recommendations and recent work?

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