DEVELOPING
LEARNING AND PARTICIPATION
IN COUNTRIES OF THE SOUTH

THE ROLE OF AN
INDEX FOR INCLUSION

TONY BOOTH AND KRISTINE BLACK-HAWKINS

UNESCO, 2001

CONTRIBUTORS

INDIA: MUMBAI
Dr Mithu Alur
Varsha Hooja
Dr Madhuri Pai

Sangita Jagtiani
Damayanti Kapodskar
Anita Prabhu
Shubhra Pandey
Shabnam Rangwala
Gulab Sayyed
Prema Sharma
Dhaya Srinivisan
Ishwar Tayade

INDIA: CHENNAI
Poonam Naturajam
Anuradha Naidu
Dipti Bhatia
Priha Desikan
Meenakshi Viswanathan

SOUTH AFRICA
Timothy Makofane
Marie Schoeman

BRAZIL
Dr Mônica Pereira dos Santos
Dr Rosita Edler Carvalho

UNESCO
Hildegunn Olsen
Sai Väyrynen

CONTENTS

INTRODUCTION

The 'Index for Inclusion' [1]is a set of materials devised in England for supporting the development of learning and participation in schools[2]. This document reports on a workshop which took place in Mumbai on 8th and 9th March 2001, funded by UNESCO, to explore the extent to which 'an Index for Inclusion'[3] would be useful for countries of the South.

Since the Index was developed to engage with the details of practice in England, it was anticipated that considerable modification would be required to the English version in order to produce materials to support the development of learning and participation in the very different circumstances in countries of the South. The central concern was with looking for ways to support sustainable inclusive development not with the introduction of the English version of the Index. This report provides ideas and guidance for those wishing to develop such materials in a way that attends carefully to such differences. It also provides an example of a successful workshop for initiating such a project.

The development of the Index had been influenced, from the start, by a collaborative research project: 'Developing sustainable inclusion policy and practice: India, South Africa, Brazil and England'.[4]This has come to be called 'The Four Nations Project' in which a shared approach to inclusion has been developed which is applicable both to countries of the South and the North. It is about developing access to learning and participation in education for all learners within their communities. Inclusion on this view is about ensuring that the Education for All movement, is truly concerned with ALL learners.

Two members of the research teams from England, Brazil and South Africa, eight members of the research teams from India, and a representative from UNESCO attended the workshop. They were joined by an additional twenty participants from India, representing both mainstream and special schools and a variety of other professional backgrounds.

The workshop was preceded by a large international conference, 'The North South Dialogue', organised by the Resource Centre for Inclusion India, an Indo-Canadian initiative. The 'Four Nation Project' teams made several contributions to this conference and there was considerable interest in their work. They were influential in gaining support for a broad

---

[1] Booth T., Ainscow M., Black-Hawkins K., Vaughan M., Shaw L. (2000) The Index for Inclusion: developing learning and participation in schools, Bristol, Centre for Studies on Inclusion in Education.

[2]For countries of the South words such as 'learning centre' are sometimes used instead of 'school' to reflect the variety of formal and informal learning centralised learning arrangements. In this report there is a change of usage from school to learning centre in the final two Sections to reflect the changes envisaged in new country specific versions of an Index.

[3] In this document *the* Index for Inclusion, or *the* Index refers to the English version, whereas *an* Index refers to versions that might be devised to support the development of learning and participation in other countries.

[4] This project is unusual in involving countries of the South and a country of the North working in partnership. UNESCO provided funds for the beginning of the research in India, South Africa and Brazil. Subsequently sites in India and South Africa obtained substantial additional funding.

approach to inclusion which resulted in the passing of a resolution calling for inclusion to be seen in the context of the implementation of the 83rd amendment to the Indian Constitution concerned with Universal Primary Education. They were invited by participants at the conference, to give a two hour presentation directly after the conference, to 200 teachers, head teachers and administrators, on the outskirts of Mumbai.

The research teams also visited schools in and around Mumbai and Chennai and met with a variety of people concerned with increasing access to and participation in education for marginalised groups. By the start of the workshop they had the variety of urban and rural contexts, and the possibilities for and barriers to, educational development in India at the forefront of their minds.

The Index, as developed in England, breaks with one feature of the approach to inclusion developed for the Four Nation Project, in that it is written to be used by individual schools. In the Four Nation Project, the focus is on the way education can be supported within an area and its communities, including any schools. In both countries of the South and the North it is important to bear in mind that schools are not the only places in which education occurs. In countries of the South the distinction between education and schooling is of additional importance since some communities may have no access to schools or even non-formal education support. Although it was designed so that schools can work with the Index on their own, the introduction of the Index has proceeded most smoothly when schools collaborate in their work with it and are supported in doing so by the education administration in their area.

The potential for extending the work on the Index to countries of the South, was discussed, initially, with research partners in the Four Nation Project, at a seminar in Manchester in July 2000. These colleagues agreed to explore its relevance to the development of schools in their contexts. The workshop was set up to build on these experiences.

This report follows the pattern of the workshop which set out to answer the questions shown in Box 1. Section 2 introduces the English version of the Index and how it is being taken up in other countries of the North. There are references to the Index throughout this document and it may make the exploration of possibilities for development of such materials easiest if a copy of the Index is available for reference. Nevertheless, the report is written so that it can be understood by itself. Section 3 explores the particular issues that arise in working in rural areas in countries of the South. Section 4 reports on the explorations of the relevance of the Index in India, South Africa and Brazil. Section 5 presents the outcome of discussions on additions to the Index for countries of the South. Section 6 provides a conclusion and a summary of the main points raised by the workshop.

BOX 1: THE WORKSHOP QUESTIONS

1) To what extent can the Index support developments in India, South Africa and Brazil?

- What changes need to be made to the concepts, review framework, Indicators, questions and process?
- To what extent are specific versions required for particular countries?
- How can translated versions be made accessible to users?
- What adaptations are made in the translation process?

2) How can an Index be made relevant to the variety of contexts within a country?

- Different language and cultural groups?
- Urban, peri-urban, and rural areas?
- State, private and special schools?
- Formal and non-formal education settings?

3) How can an Index be introduced from different settings?

- From within a regular school?
- Outreach from a special school?
- From a local government education department?
- From a Non-Governmental Organisation?

PRESENTING THE INDEX

The 'Index for Inclusion', is concerned with developing education so that it encourages the learning and participation of all learners. It does not focus on a particular group of learners who are disabled or categorised as having special educational needs, although it is concerned with them too. It encourages a critical examination of all aspects of schools, including approaches to teaching and learning, curricula, and relationships between and amongst teachers and learners. It recognises that development takes place in two ways: through detailed analysis and planning and more generally, as a Brazilian colleague emphasised, through changes in people's 'hearts and minds'. It asks staff to build on their own knowledge and experience and that of, learners, parents and other members of communities, in identifying development priorities and implementing them. In the process of working with the materials schoolsadapt them to their own contexts.

It has several elements:

> Key concepts - *to provide an approach to increasing learning and participation.*

> A Review Framework (Dimensions and Sections) - *to structure the approach to the evaluation and development of the school.*

> Indicators and Questions - *to support a detailed review of all aspects of a school and to guide the implementation of development priorities.*

> An inclusive process - *to ensure that review, planning and implementation are themselves inclusive.*

KEY CONCEPTS

The key concepts of the Index reflect its concern with all learners and the reduction of barriers to their learning and participation arising in any aspect of the school or in its relationships with its communities.

Inclusion
In the Index, *inclusion* involves an approach to education informed by values which provide a direction for educational change. The beginnings of the approach to inclusion in the Index are set down in Box 2 (p.6). However, the detailed guidance for reviewing the school provides a more extended definition of inclusion. In working with the materials and the process, educators develop their own approach to inclusion.

BOX 2 INCLUSION IN THE INDEX

Inclusion is concerned with :

- Recognising the right of learners to an education in their locality.

- Increasing the learning and participation of all learners.

- Minimising all forms of exclusion.

- Developing the curricula, cultures, policies and practices in schools so that they reflect and respond to the diversity of learners in their locality.

- Improving schools for staff as well as for learners.

- Viewing diversity as a rich resource to support the learning of all.

- Fostering mutually sustaining relationships between schools and communities.

- Recognising that inclusion in education is only one aspect of inclusion in society.

Boys playing in the street, Mumbai

Inclusion is about every aspect of work in a school. It's about every lesson. It's about teaching science. It's about children being together in the playground. It's about how people behave in staff meetings and how teachers work together. It's about what happens when a parent comes to a school for the first time. It's about how the fabric of the building looks. It's about whether or not that building is accessible to children and adults, with disabilities. It's about every aspect of our lives. ... it isn't something that you do separately when you go to work – it's about how you live your life and how you want children in schools to live their lives, learning in schools together.

Barriers to learning and participation

Learners are viewed as encountering difficulties when they experience *barriers to learning and participation* . These may arise from the material conditions of homes and schools, community cultures, learners' attitudes to each other and themselves, the skills of teachers, the appropriateness of curricula including the language of instruction, and the nature of school, local and central government policies. The Index provides an alternative language to the idea that educational difficulties arise only from 'the special educational needs' of learners, a notion that directs attention only at the deficiencies of learners rather than the conditions for successful learning.

Resources to support learning and participation

The sources of barriers to learning and participation may also provide *resources to support learning and participation.* For any particular overall level of economic resource there may be additional under-utilised resources within learners, staff, communities and administrative structures that can be mobilised to support learning and participation.

Support

Support is given a broad meaning as 'all activities which increase the capacity of schools to respond to the diversity of their learners'. Support is commonly seen as occurring when a learner is directly supported by an adult or more rarely another learner. In the Index such direct human support is seen as equivalent to curriculum or teacher development, or ways of organising classrooms which reduce the experience of educational difficulties.

Women from the local community assisting the pre-school teacher, Chennai, India

A REVIEW FRAMEWORK (DIMENSIONS AND SECTIONS)

The Index structures the exploration of schools and the development and implementation of plans. Developments in schools are considered along three Dimensions: 'Creating Inclusive Cultures', 'Producing Inclusive Policies' and 'Evolving Inclusive Practices'. In order to make sustainable changes in practices, these have to be supported by clear policies and collaborative cultures in which developments are passed on to new staff and learners. Each Dimension is divided into two Sections as shown in Box 3. Together the Dimensions and Sections provide a planning template to shape the exploration of the areas of activity within a centre of learning to which attention should be paid in writing an inclusive plan.

> **BOX 3: DIMENSIONS AND SECTIONS**
>
> Dimension A: *Creating Inclusive Cultures*
> • 1: Building community
> • 2: Establishing inclusive values
>
> Dimension B: *Producing Inclusive Policies*
> • 1: Developing a school for all
> • 2: Organising support for diversity
>
> Dimension c: *Evolving Inclusive Practices*
> • 1: Orchestrating learning
> • 2: Mobilising resources

Each Section contains up to twelve aspirations, or 'Indicators', for the inclusive development of a centre of learning. Examples are given in Box 4.

BOX 4 : SAMPLE INDICATORS

A. Creating Inclusive Cultures
A.1. Building community
A.1.1 Everyone is made to feel welcome
A.1.3 Staff collaborate with each other
A.1.4 Staff and learners treat one another with respect

A.2 Establishing inclusive values
A.2.1 There are high expectations for all learners
A.2.2 Staff, learners and parents/carers share a philosophy of inclusion
A.2.5 Staff seek to remove all barriers to learning and participation

B. Producing Inclusive Policies
B.1. Developing a school for all
B.1.2 All new staff are helped to feel settled.
B.1.3 The school seeks to admit all learners from its locality.
B.1.4 The school makes its buildings physically accessible to all people.

B.2 Organising support for diversity
B.2.2 Staff development activities help staff to respond to learner diversity.
B.2.8 Barriers to attendance are reduced.
B.2.9 Bullying is minimised.

C. Creating Inclusive Practices
C.1 Orchestrating learning
C.1.1 Lessons are responsive to learner diversity.
C.1.4 Learners are actively involved in their own learning.
C.1.7 Classroom discipline is based on mutual respect.

C.2 Mobilising resources
C.2.2 Community resources are known and drawn upon.
C.2.3 Staff expertise is fully utilised.
C.2.4 Learner difference is used as a resource for teaching and learning.

All the Indicators are worded to express something positive to aim for rather than a negative situation to be avoided. The meaning of each Indicator is clarified by a series of up to seventeen questions which help an assessment of the extent to which the Indicator reflects what is happening in a school. This information provides the basis for establishing a plan for putting the Indicator into practice. The questions for the Indicator, A.1.3 'Staff collaborate with each other' are given in Box 5 (p.9).

A.1.3 Staff collaborate with each other.

i)   Do staff treat each other with respect irrespective of their roles in the school?

ii) Are all staff invited to staff meetings?

iii) Do all staff attend meetings?

iv) Is there wide participation in meetings?

v)   Are all teachers and classroom assistants involved in curriculum planning and review?

vi) Is teamwork between staff a model for the collaboration of learners?

vii) Do staff feel comfortable about discussing problems in their work?

viii) Do staff know who to turn to with a problem both more and less urgent?

ix) Are regular supply staff encouraged to be actively involved in the life of the school?

x)   Are all staff involved in drawing up priorities for school development?

xi) Do all staff feel ownership of the school development plan?

AN INCLUSIVE PROCESS

An inclusive, participatory planning and development process is at the centre of the Index. The process of exploring the school is initiated by a representative co-ordinating group who start by familiarising themselves with the concepts, Review Framework and the Indicators and Questions. They may benefit from having 'a critical friend' in the group who is familiar with the school but independent of its power structures. This could be someone from another school with which the Index work is being shared. There are a series of activities to assist this initial exploration.

The need for wide consultation should be emphasised as the co-ordinating group examine the Indicators and questions and become aware that many of them cannot be answered without asking for the view of others. Following work with other staff and with parents, learners and others with an involvement in the school, the group collates priorities for development, and co-ordinates their implementation. The Index process is summarised in Box 6. During the process, additional Indicators and questions of particular relevance to the learning centre, may be added.

BOX 6 THE INDEX PROCESS

- Establishing a co-ordinating group

- Consulting about the school

- Producing a development plan

- Implementing priorities

- Reviewing the process

The Index builds on the sharing of existing knowledge about the school, of staff, learners, parents/carers and other community members about the barriers to learning and participation and resources to support learning and participation in their school. Before looking at the Indicators and questions, this knowledge can be structured using the Key Concepts and the Review Framework. The following questions can help in this task:

Pre-school in Mumbai

- Who experiences barriers to learning and participation?

- What are the barriers to learning and participation?

- How can barriers to learning and participation be minimised?

- What resources support learning and participation?

- How can additional resources be mobilised?

There is not one right way of working with the Index. The materials are a resource which can be used in different ways for various purposes in a variety of settings. The Index was written to support staff to promote the inclusive development of their school. However, support from outside the school, which may be another school, may be essential for schools who need encouragement to consider the benefits of developing learning and participation in this way or who need some help in developing an approach to planning. Typically a learning centre might start off with some outside support and then this would be reduced as they gain confidence in using the materials.

CONSTRUCTING THE DIMENSIONS, SECTIONS, INDICATORS AND QUESTIONS

The Index was devised in collaboration with many teachers and administrators. The construction of Dimensions, Sections, Indicators and questions started with the setting down of features of schools which presented barriers to learning and participation or suggested resources to overcome them. If an issue was seen to cover a broad area, which had strategic significance for school development it might become an Indicator, a Section or even a Dimension. Thus a Question 'Do the cultures of the school support the participation and learning of all learners?' becomes an overarching structure or Dimension because it can subsume many other areas such as a concern for achievement, collaboration, community building and the development of shared values. The Index was refined several times in the light of feedback about how it supported planning and development work in practice.

There is a degree of arbitrariness about the Dimension under which a particular Indicator is placed, since some issues are a matter of Culture, Policy *and* Practice. To avoid repetition an Indicator is only placed under one Dimension. In places the same Question could be asked of more than one Indicator. As schools construct their plans they may find that they wish to use Questions from one Indicator in assessing progress in implementing another.

There are more Indicators and Questions than might appear relevant to any one school because the Index was written so that it would be useful in all schools in England and this creates a degree of flexibility which makes it relevant to a range of contexts. If a particular Indicator or Question does not seem pertinent to a school this does not mean that it will not be significant in a different one.

USING THE INDEX WITH OTHER COUNTRIES

Even before publication there was strong interest in the Index from people in other countries. The authors were very cautious about arguing for the relevance of a set of materials devised in England to other contexts. In thinking about the inclusive development of education in these countries it is important to ask 'What materials can support such development?', rather than, 'How can this particular Index support development? Yet, preliminary reactions from several countries indicated the relevance of its concepts, structures and much of its content, to other countries of the North. For example, it is being used as part of a major research project in Norway in an innovative approach to examining the implementation of the inclusion strands of education law. It was seen to contain an implementation strategy for putting into practice the requirements of Norwegian schools to adapt education for the differing backgrounds and attainments of learners. Its use can be compared with the results of the implementation strategy already envisaged by the National and Local administrations.

Although the transforming powers of translation should not be underestimated, it became clear that little of the content needed to be changed for the Norwegian context. Similar experience was gained in Spain, Portugal, Romania and Australia. The materials appeared to be tapping into common features of education systems and common principles about the inclusive development of schools.

*In Romania schools are beginning to work on the Index ... teachers are
beginning to open up ... trying to look to involve the inspectors to give
pedagogical support rather than just checking up... In each school one person
was chosen to be a 'critical friend'. One school had chosen a young woman
who was a PhD student
and had the professional
background to be able to
give support but was
also a non-threatening
figure for the teachers.
The schools all chose
three Indicators that they
wanted to work on. They
decided on questions for
the parents and the
children and for the
teachers. And after that
process it was surprising
for the teachers that
when – for example, 'Are* Primary school Bucharest, Romania
*all children valued in the classroom?'- the teachers said 'yes' and the children
said 'no'. They used that experience as a lesson that they needed to develop
their teaching processes. And as they started to discuss they found that there
were teachers who were using child-centred approaches but that knowledge
was not transferred between the teachers because there was no room for
discussion. So they tried to work on developing practice and looking into how
to work together.*
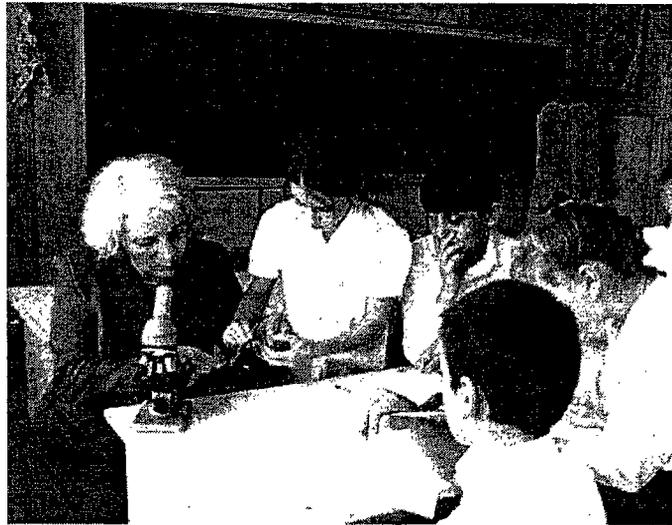
THE RURAL CONTEXT

In order to ensure that the range of contexts in countries of the South were considered, there was a workshop activity using a hypothetical case study of a school in an economically poor rural area in South Africa. The case-study was inspired by cases in the South African Four Nation Study Report[5]. Any suggested revisions to the Index needed to take into account fully, the realities of these contexts. Such rural situations were very different from the day to day experience of most of the participants at the workshop whether from the North, or the South. Participants discussed the Questions below in groups and then share their ideas.

- How do you relate this case study to contexts in your own country?

- What are the barriers to learning and participation?

- What resources can the school draw upon to minimise barriers to learning and participation?

THE CASE STUDY

The primary school has 600 learners, and is situated in a deep rural area in South Africa. The school has evolved from a wood and mud structure with a thatched roof into a brick building with iron roofing, largely through community efforts. After 1994 and the democratic elections which led to the ending of apartheid, the local authority provided bore-holes, water pumps, water tanks, taps, electricity, doors, and replaced broken windowpanes. The school still has pit toilets.

Children travel by foot or by local taxis to school. Some of the children live in places inaccessible by car as the head reported when describing his long walk to the funeral of a child who had died from a snakebite. The furthest distance travelled on foot is approximately 24 km from an area across a nearby river. This is a farm area, with large areas of land owned by white farmers, which partly explains the great distances some learners have to travel to school. Although there are large areas without schools, in the vicinity of the primay school there are several other schools. Approximately 80 learners have to cross the river to reach the school, which is inaccessible when it rains heavily. Because of the distance, the older pupils sometimes carry the younger ones on their backs, especially when they cross the river. Fortunately, no child had drowned.

Of the fifteen staff 12 have 3 years of post matriculation training and the remainder two years. Commonly in the early 1980s teachers in schools for Black learners, might have undertaken one year training after completing grade 10 at school which entitled them to their Junior Leavers Certificate.

The learners come from poor homes. Most parents are unemployed, some work on the farms, others are absent in the cities. The absence of parents can result in lack of protection for girls

---

[5]Muthukrishna, N., Schoeman, M., Ntombela, T., Jairaj, S., (2000) Developing sustainable inclusive education policy and practice in South Africa, Interim report, Durban, University of Natal.

who may be victims of abuse, although this is a much greater problem in some of the neighbouring schools.

The class size is about 45 and sometimes a room is shared by two classes of this size. All learners at the school speak Zulu as their home language although the language of instruction is English from the first grade. Some of the teachers are not very fluent in English themselves. But many parents say they prefer the school to teach in English because it will give their children better prospects.

There are limited funds available to the school. Few learners can afford to pay the school fee of 30 South African rand a year (about 3 pounds sterling, 200 hundred rupees, four and a half US dollars). A meal was provided for those coming to school without lunch but this scheme has been interrupted due to administrative problems which are slow in being resolved.

The government requires all schools to produce a rolling three year development plan. The school has worked on a whole school development project run by a Non-Governmental Organisation. They have been involved in several other school development projects. However they are finding it hard to implement the curriculum developments required by the government.

The school is willing to enrol learners with disabilities and has one learner with mild cerebral palsy. The school had included other children with disabilities earlier. But this lessened after the establishment of a school for the physically disabled located on the same road a short distance away. There are generally very few special schools in such rural areas. It is national policy that all special schools should be transformed into resource centres, but the special school has not yet followed this lead. The primary school gets no support for the learner with cerebral palsy from the special school. She is 'making good progress' but would benefit from advice about physiotherapy.

Despite their poverty and unemployment, most parents are literate in both English and Zulu, and assist with homework. The headteacher attributes this to the work of missionaries which helped to redress the neglect of the apartheid era. Parents are very supportive of the school, a third of them attend parents meetings and farmers give their workers time off work, and supply trucks, for them to attend. Parents are represented on the governing body and have helped with projects such as putting up a fence round the school.

DISCUSSION

The participants found little difficulty in responding to the case-study using the concepts of barriers to learning and participation and resources to support learning and participation. There was an awareness that many issues were not addressed such as the details of the curriculum and the approaches to teaching beyond the language issue, but it sparked off discussion about these. It was also clear that other schools in South Africa, India and Brazil might face much greater problems than the primary school in the case study with its strong support from its communities and high community literacy rates and relatively favourable staffing. But the case-study also highlights the importance of avoiding stereotypes about rural schools and their communities. It also highlighted the importance of seeing an area as the

14

target for educational development rather than particular schools given the great distances travelled in this particular case and the need to draw on the resources of the special school for all the schools in the area. Nevertheless it served its purpose in directing attention at economically poor rural contexts and highlighting the problems that are shared in different countries.

Relationship to other contexts

Several people suggested that it could have easily been a school in India:

Many of our schools are under-staffed, ill-equipped, underfunded. Children may be malnourished. Some children drop out of school in order to take their younger siblings to school...

One difference was the distance from school which is far greater than arises in India, where the largest distances from a school might be five or six kilometres.
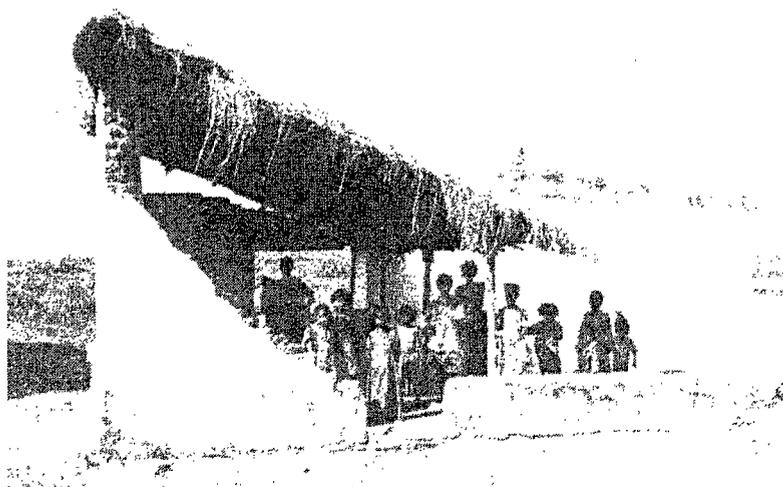
Pre-school outside of Chennai, India

What are the barriers? What are the resources?
Physical resources and location
Distance and the lack of adequate transport were identified as barriers along with the river and the lack of space in school. In the South African context, an area educational development plan might involve the location of an additional school the other side of the river. Such large distances prevent many children from attending school and limit the involvement of their communities in the school and the role the school can play in community development.

Most participants were concerned about the pit-toilets but some suggested that they were sensible where resources were restricted and more hygienic than flush toilets with inadequate plumbing. There was some concern that building should be developed using local materials which could be repaired simply. Some questioned the advantage of using metal roofs, noisy in rain, over thatch in an area with high rainfall.

There was discussion about whether the special school should be seen as a physical barrier to greater inclusion or an ideological one. The building of the special school had led to fewer learners with disabilities attending the primary school in the case study, despite its welcoming culture. There was apprehension that since it was for learners with 'physical disabilities' the special school might reinforce the exclusion of disabled learners outside this category. There was concern that it could encourage false expectations:

There are very few rural areas with special school. It's not a reality that you can count on but everyone has in their minds that there ought to be a special school somewhere even if its an imaginary one...

However the special school could become a resource in the area as one participant commented:

Instead of having a special school...the resources of the two schools could be put together and have in the area one inclusive school...there's a scarcity of resources in the area....you would have double the resources.

Communities
Communities are poor and some are excluded from involvement by their distance from the school. Yet, the communities are a substantial resource for the school and supportive of it and the school had capitalised on this goodwill. The extended families help to make it possible for a degree of stability for learners whose parents are working in other parts of the country. However, in discussion it was pointed out that for many schools in South Africa there was little community involvement, and a legacy of distrust for State institutions. There was concern that the education learners receive should be related to the economic needs of their communities.

Older woman with child, Dharavi, Mumbai

Learners
Many learners arrive at the school tired and hungry. Nevertheless they were noted to be highly motivated to attend the school given their willingness to travel large distances. It was recognised that the learners themselves are a considerable resource for each other and the community although it was unclear from the case-study how far learners support each other's learning or are involved community initiatives, such as those around health issues.

Teachers and approaches to teaching
Although most staff have three years of training after matriculation some did not. The levels of training were better in this school than many others. The adequacy of training was seen to be of major importance as a basis for school development.

There was much discussion of the barriers created by using English as the language of instruction for children whose first language is Zulu and the complexity of community attitudes to the language. There was concern at the limited knowledge of English of some teachers, who ended up speaking a mixture that was 'neither English nor Zulu'. One participant commented that in rural India the language of instruction would be the State language and so such difficulties are avoided, although the situation could be more complex

in cities where schools might use the State language, or Hindi or English as the language of instruction. However, another colleague told a story about a teacher who had encountered such difficulties in a rural school, where the children did not speak the state language:

> *The government set up a Marathi medium school in deep Maharashti for a caravan of Lombardi people, a nomadic people who speak a language that is a mixture of the local languages; a bit of Telegu, a bit of Kanara, but virtually no Marathi A young graduate teacher was appointed. The infrastructue was ready, the school was ready, the children were ready. Then came the language problem, the children didn't understand Marathi and the teacher didn't understand the language that was spoken there. He tried to get over the problem by using signs and gestures. The person who was happiest was a profoundly deaf child who was at the school, he started signing with everyone. The teacher has become fluent in the language of the tribe and the children are beginning to speak Marathi.*

Other sources of support

The local administration was seen as both a means to channel advice and resources and as a barrier when development were prevented by bureaucratic inertia. It was important that the help from NGOs and the local administration in implementing government initiatives were of high quality and were carefully co-ordinated if they were to be a useful resource for the school.

CONCLUSIONS

Despite its brevity, and lack of significant detail about the curriculum, the case-study served its purpose in generating a considerable amount of discussion and fixing in everone's minds the importance of preparing materials that were relevant to rural contexts.

Exploring the Index in countries of the South: India, South Africa and Brazil

The Four Nation Project research teams from India, Brazil and South Africa reported on their explorations of the usefulness of the index concepts, review framework, Indicators and Questions and process in their countries. This section reports and analyses the contributions of these teams. The composition of the teams is set out in the acknowledgements at the start of this report. There were two teams from India; the first based at a school of the Spastics Society of India, Bandra, Mumbai, and the second at Vidya Sagar, a school for learners with physical and multiple impairments in Chennai. At both centres, the work in the Four Nation Project involves a change to previous modes of working by supporting learners with physical impairments in the mainstream and in developing centres of learning that reach out to all learners within their communities. In Mumbai six thriving Balwadis (community pre-schools) have been established in the Dharavi slum, open to all children. The special schools are also opening their doors to learners from the slums. In Chennai, colleagues are supporting the participation in education of children from the Irula tribe, who have lost their ancestral forest lands, and Dalit (untouchable) groups. In Brazil, two colleagues are working on the inclusive development of three schools in economically poor districts on the outskirts of Rio. In South Africa there are two project areas one based in rural Kwazulu-Natal and the other in Gauteng province. Only the colleagues from Gauteng were represented at the workshop. In their area they are working with schools which cover the range of urban contexts, from privileged former white schools to impoverished urban townships.

INDIA: MUMBAI

Dharavi, Mumbai

In Mumbai, the team produced a thorough review of the applicability of the framework, Indicators and Questions to the variety of urban contexts in mainstream and special schools. They worked with the staff of the National Resource Centre for Inclusion and Spastics Society of India school at Bandra (30 staff), the Spastics Society of India school at Colaba (12 staff), with 13 staff from the Dharavi community pre-schools and with eleven principals

at schools which had accepted on roll, learners previously educated in the special schools at Bandra and Colabá. The latter schools consisted of five private schools, two grant-in-aid schools (part state funded) and four municipal schools. Where necessary the materials were translated on the spot into Hindi and Murathi.

Concepts

A dialogue about the concept of inclusion was a feature of the workshop as a whole. The presenters from the Mumbai team put forward a variety of views of inclusion, and who experienced barriers to learning and participation. One suggested: 'since we are a special school, inclusion for us is primarily about children with disabilities'. In the conclusion to the presentation, inclusion was said to be 'focused on the individuals with disability, the girl child and the socially disadvantaged.' Others felt that there needed to be a move away from a focus on disability. It was argued that a concern with a group of learners outside the mainstream, such as learners with impairments, can lead to an emphasis on providing access to schools rather than overcoming barriers to participation within them. The concept of inclusion in the Index involves moving from who experiences barriers to learning and participation to the nature of these barriers within the cultures, policies and practices of schools and then to the resources that can be mobilised to minimise them. Where such barriers involve inappropriate curricula or approaches to teaching insufficiently responsive to the diversity of learners, then this may create difficulties for most learners.

Framework, Indicators and Questions

The framework of the Index, the Dimensions and Sections, were seen to be relevant across all contexts. The reaction to the Indicators and Questions depended on the context. In the better resourced contexts, there were detailed comments on the Indicators and Questions. The suggested changes provide an important opportunity for detailed dialogue about differences in language, perspective and context between England, India and other countries, although there is only space here to discuss some of them. Within the economically poorest contexts many of the Questions were seen to be irrelevant and this highlighted the importance of working with the concepts and framework in a participatory way before moving on to the detail of the Indicators and Questions, if at all.

Pre-school, Colaba, Mumbai

It was suggested that the wording needed to be changed wherever the issues of ethnic minority status, race, religion, and sexual orientation were raised, since they did not give rise to discrimination in education in India. There might be discrimination in relation to these issues outside schools but not within them. It was argued that 'caste' was not a barrier to learning and participation in schools: *'Every second person is of a different caste so the castes are all mixed up'.*

Others pointed out that while caste might not be so important in some urban areas in many rural areas, Dalit people, if they have access to learning centres at all, may be confined to their own schools. In discussion some participants insisted that the challenging issues needed to carefully worded to reflect concerns in India but they did need to be retained.

Some modifications were simple such as in the substitution of 'management bodies and trustees' for 'governors'. There were also several examples where the wording needed to be simplified. One participant suggested that this had something to do with India being an oral culture. Some comments revealed poor wording in the English version. In relation to Indicator A.2.2: *staff, governors learners and parents share a philosophy of inclusion*. One of the Questions asks: *'Is inclusion viewed as a never-ending process of increasing participation rather than a state of being inside or outside of the school?'*. Informants had difficulty in understanding this Question. On reflection many in England would have a similar difficulty. It is too long. But it does attempt to engage with an important issue. It was intended to encourage people to think of inclusion as concerned with the conditions for increasing participation within the mainstream rather than only with access to it. It was also meant to discourage calling any school 'an inclusive school' as if the job of removing all barriers to learning and participation could be complete.

Other suggested changes were a starting point for more extensive debate. In relation to Indicator A1.1 *Everyone is made to feel welcome*, an additional Question, not in the English version was thought to be necessary by informants to the Mumbai team: *If the school feels unable to cater to the needs of the child, do they guide the parents to an appropriate institution?* But it is not clear that a positive answer to this Question would imply greater inclusion. Such an item invites a dialogue around several further questions:

- Under what circumstances would a school feel that they are unable to cater for the needs of a child?

- Should they perhaps find out what the parents and child themselves think?

- Do children have rights to attend particular schools?

- To what extent is the Question related to the Indian context of private, partly-private and municipal schools?

- How would the Question seem in a rural context where there was no alternative school?

- Does the Question assume that some children, for example those with severe impairments, cannot be part of the mainstream?

For the same Indicator the team reported the view that Brailled or taped versions of school information or sign language interpretation could never be available in an Indian School. Clearly, there are constraints on resources, though more so in some areas than in others. As in Brazil or South Africa a school may not have the resources to have a school brochure let alone one in several languages, or in Braille. But the assertion raises a need to debate the appropriate form of communication for deaf people, which may not be shared with others from the deaf community.

In relation to Indicator, *A.1.7: All local communities are involved in the school,* it was suggested that it was inapplicable to ask 'Do staff seek the views of local community members about the school?'. This might have seemed problematic for respondents working in a special school taking learners from a wide area, although some would argue for the relevance of local views in that situation. However, for other respondents from the community pre-schools in Dharavi, such a Question was not only relevant but was already acted on since, provision was being developed through consultation with the communities.

A similar issue arose in relation to *B.1.5 All learners new to the school are helped to feel settled,* some respondents thought it difficult to pair new learners with more experienced learners, to help them settle when they join a school and it was therefore suggested that a Question raising this should be deleted. It was also thought that an induction programme could not take into account differences of learner attainment and home language. However, while some schools might find such arrangements difficult, others might not, and the learners might benefit from them in either case.

There were concerns about some Questions which appeared to take little account of the Indian system. In relation to *C1.4 Learners are actively involved in their own learning,* there is a Question 'are curriculum plans shared with learners so that they can work at a faster pace if they wish?' . This was thought to be unworkable in India. Many would think it unworkable in England too. The point of having it there is that it helps to challenge educators to see the learning process from the point of view of learners, and to explore the limits to which learners are allowed to be active in their own learning.

Under, *C.2.4 Learner difference is used as a resource for teaching and learning,* it was thought inappropriate for the variety of languages spoken by learners to be used as a resource for work in school or for learners who had overcome a particular problem to act as mentors for those experiencing a similar problem. This seems too, to be a starting point for debate in India and elsewhere, rather than a fixed conclusion.

Comments on the Index process
In consultation with the some of the school principals, the process of engagement with the Index materials became critical. Discussions with the municipal schools could not proceed without written permission from the local authority. Once permission was granted 'the attitude of the principals immediately changed' and they generally went out of their way to be co-operative. In some cases this wish to be co-operative meant that principals were keen to point out how well they were doing with learners with impairments, because they thought this was what the team wanted to hear, and to gloss over any difficulties.

The team became aware of the significance of 'beat officers' (staff in the local education administration with administrative responsibility for a group of schools) in helping to encourage engagement with inclusion:

> *We happened to meet a beat officer who was in charge of fifteen schools. From her we realised that beat officers in any ward in Mumbai have a number of schools under them. They meet the principals of these schools every month so if we can get the beat officers of these schools to start thinking inclusively then in their monthly meetings*

they can influence their principals and then it's much easier for inclusion to start happening in municipal schools. This is a very important thing we realised.

However with some principals, in schools with few resources, it was difficult to ask about the applicability of certain Indicators and Questions to the Indian context since they immediately applied them to their own school situation, as one presenter reported:

As I was reading the Questions and translating them into Hindi, I simply skipped them. To ask them would have been foolish on my part. For example ... 'Are basic facilities such as toilets, showers and lockers kept in good order?' We know these facilities aren't available so how can we ask this Question?

At a school in the team were exploring the Indicator 'Staff seek to remove all barriers to learning and participation in school':

When we were asking the Questions [associated with this Indicator] the principal was listening for some time and then he had a very sad expression and then he said, 'Please I don't want to go ahead'. We asked why. He said, 'I don't have the infrastructure, I don't have the resources to give them these facilities and just reading them makes me feel even worse.

Pre-school in Dharavi, Mumbai

It makes me go down. I can't give all this and even in another four or five years I won't be able to give. So please don't ask any further Questions. Can I offer you coffee and then please can you leave me alone?'

In such a school the exploration of inclusion and its development requires a very different approach, which does not involve introducing a complex document like the Index at such an early stage. One member of the team reiterated the importance of an inclusive collaborative process between those introducing an Index and staff in schools:

In the Indian context a participatory approach ... has to be done otherwise this inclusive will become exclusive. If the respondent becomes defensive, or becomes irritated, or becomes very shamed or boastful, then all these responses would affect the research. So I would say if inclusion is the ideology and the process, then participatory approaches have to be used.

There are two distinct parts to the Index and one is a philosophical dimension and one of them is a content dimension. In India, if we start with the philosophy it is going to go across brilliantly. In my situation, in the city, it is a very strange phenomenon that the more deprived a school the more inclusive it is. Because the more exclusive as school a school is, in the sense of rich, the more exclusive it also becomes more generally. Which is why I thought the schools that were chosen in Bombay were brilliant

Pre-school in Dharavi, Mumbai

because they are more likely to be inclusive by default. If you do not look at the content of the Questions - such as the lockers, the shower-rooms, the desks – but we look at the approach of people, the attitudes and the philosophy, I think the Index may not even need to change.

Mumbai conclusions

The Mumbai team concluded that many words needed to be changed in the Index and that a new English as well as a Hindi version of an Index were essential for India, even in relatively advantaged areas. They found that the Dimensions of cultures, policies and practices were equally applicable in India. They felt that some of the Indicators were inappropriate in schools now but that it is 'absolutely essential' that they 'need to be a part of the Indian version of the Index for the future'. However the introduction of an Index in economically poor areas needed to be thought out carefully so that the materials are directly relevant to these contexts and the teachers engage with them in a truly participative process.

They argued that awareness raising about inclusion was necessary in many schools before an Index could be used to support school development planning. It might be helpful if such activities were introduced into an Indian version of the Index. They argued that 'a centralised Code of Practice in the form of National Policy is essential for successful inclusion to take place in the country'. Perhaps an Index for inclusion could be part of the process of constructing such a policy.

The team in Chennai took a different approach from their colleagues in Mumbai. They decided to work with the Index within their own school, Vidya Sagar, and look at its applicability to their own situation. They started out with the assumption that they were a very including school but found that they were challenged by the materials to reconsider a number of areas.

Working with the process

They set up a small co-ordinating group of senior staff who familiarised themselves with the materials then they arranged for all staff to attend one of two workshops where they worked in groups representing a cross section of the school; senior staff, teaching staff, therapists, aids and volunteers. The workshops were bilingual. Although the materials had been duplicated in English they were read out in Tamil because some staff were not fluent in English. At the end of every Section of the Index each group tried to reach a consensus about what they felt was true of their school. The majority opinion of the group and those opinions which differed from it were all noted.

They then met again as a whole staff of about forty people to discuss what each group had found:

> As a special school we thought we were inclusive. One of the objectives of our centre is that we take in children with varying disabilities of differing severity ... and ages ... And we have people from different backgrounds coming to our school. We say anyone who comes to our school must be offered some kind of service, so we don't turn anybody away. We have people from different language backgrounds, different caste backgrounds, different religious backgrounds. So we assume we are extremely inclusive in our practice. But as we went through this process we learnt a lot about ourselves...... We have every thing to gain by sharing but it is a painful process. It was extremely enlightening to find out things were different from what we had thought.

Reacting to the Indicators and Questions

Like their colleagues in Mumbai, they found some words needed to be replaced. For example the notion of 'pastoral care' is a particular feature of the organisation of secondary schools in England referring to staff with responsibilities for learner welfare but usually also with a disciplinary role. There were some issues which the staff had difficulty in discussing such as 'sexuality' and some staff felt there was 'no place for it' in the Index.

Other Indicators did not seem relevant to the particular circumstances in this special school though again this reaction might be a starting point for debate. Thus the staff in the school felt that they could not relate to Indicator B.1.6 'The school arranges teaching groups so that all learners are valued'. Some of the Questions under this Indicator refer to common practices in England, for example the grouping of learners according to attainment in particular subjects. But this Indicator would seem to have a relevance to Vidya Sagar. The Indicator is about whether a school manages to make all groups of learners feel equally valued. The school does have a grouping policy and in discussion it emerged that Vidya Sagar groups learners according to four 'streams' of attainment, one of which consists of learners with very severe disabilities and limited understanding of language. In such circumstances schools have to work hard to ensure that all groups are equally valued.

Priorities for change

Other parts of the Index drew attention to changes that needed to be made in the school. When they explored the Indicator *A.11 'Everyone is made to feel welcome'*, they realised that they privileged those communicating through English and discriminated against particular staff groups and parents and visitors whose main medium of communication was Tamil. Most signs, information, and pamphlets were in English. There were no signs or other information in Braille even though a member of staff working on the Index is blind. The issue of language also affected teamwork which became apparent in relation to Indicator A.1.3: *Staff collaborate with each other:*

> *We pride ourselves that our strength is that we work in teams ... but when we worked in the smaller groups we realised that some people did not feel that way ... maybe because of the language because we were always speaking in English ... Some Tamil speakers felt left out - we needed to be bilingual in our meetings.*

Discussions of A.1.5: '*There is a partnership between staff and parents'*, helped them to reassess the extent to which they had kept up the flow of information to parents. Some were 'left behind' in terms of information available about the field of disability and changes in law affecting their children. There were 'a large number of parents who are involved as staff and volunteers, [but] parents were not involved in...policy making.'

The team were challenged by Indicator A1.7 *'All local communities are involved in the school'*. Although they saw themselves as part of the larger community the only interactions they had were with other educational institutions. They had very little contact with individuals or other organisations in the community. They felt on the margins of life in the neighbourhood and that others did not know about them and what they did. They also felt that they could do more to fulfil the Indicator C1.4: *'Learners are actively involved in their own learning.* They felt that learners could be more involved in self-assessment and in planning their own work.

Priorities into practice

In general they wanted to work with more learners and parents to obtain their view of the school. They stressed the importance of the continuation of the work of the co-ordinating group to follow through all the issues that had arisen. They were putting a number of changes into practice and were planning further interventions. They have changed the way they conducted planning meetings to discuss the progress of learners and work for the

Primary School, Chennai

following term. They used to have 'monolithic case conferences' but now they break up into smaller groups and there is much wider participation, in planning for lessons and in consultation about the development of the organisation. They have started to work with

parents in small groups to encourage 'more active discussion with teachers'. They have begun to involve learners more in organising activities in the school and have held elections, amongst the learners, for leaders of four new 'houses' or sections into which the school has been divided. They were planning to invite local community members to the school to interact with the learners.

BRAZIL

The Brazilian team discussed the Dimensions and Indicators of the Index with the three primary schools with which they were working on the Four Nation Project. The Index was used therefore in the context of their existing work supporting the inclusive development of these schools. They did not have time to examine the detail of the Questions nor to introduce the Indicators as part of an inclusive process. They wanted to assess the extent to which the Indicators reflected current concerns of their schools and might connect with issues on which they wanted to collaborate in the future. They had a meeting in each school with the teaching staff. They started with a discussion of the approach to inclusion and considered the sense teachers made of the three 'Dimensions'; cultures, policies and practices. They then read and discussed each Indicator.

Translation
Before they could work at all with the Index materials they had to translate them into Portuguese. This was a time consuming task and each time they presented the Indicators they had to refine the translation. Some Indicators were omitted during the translation process, when on further reflection they might have been kept. Reference to learners who speak a different home language from the language of teaching in the school was left out because all the learners in the schools spoke Portuguese. Later it was realised that it would be applicable to immigrant groups and for some native Brazilian people. They omitted an Indicator B2.4 about the English Code of Practice ('on the identification and assessment of children with special educational needs') but realised that an important part of Brazilian legislation, 'the Statute for Children and Youth' might be substituted with relevant Questions. Some concepts did not translate easily between countries as one colleague commented: 'We don't have a word as bullying. We have violence in school, but I wouldn't translate it as bullying. I'm looking for the right notion in Brazil' (Indicator B2.9 *Bullying is minimised*).

Responding to the concepts
In their previous work with the school they had been keen to broaden the perception of the schools so that they did not think of inclusion solely in terms of disability. In discussing the approach to inclusion of the Index the teachers argued that the inclusion of disabled learners was not a priority for them, since 'they have their special provision'. This reaction highlighted a problem of trying to adopt a wide approach to inclusion, which is also encountered in England. Inclusion has to be seen as not only about learners with impairments but these learners do have to be kept in the forefront of discussion as an excluded group.

Reaction to the Framework and the Indicators
All three schools felt that the 'Dimensions' were a 'very helpful' way to think about school development. Since these were schools that the researchers knew well they could compare what the teachers said about their practice with their own observations. For example, in

discussing Indicator C1.6, *'Assessment encourages the learning of all learners'*, staff in one school felt that this was definitely true of their school, yet the researchers had observed the situation to be different, over a long period of time.

The teachers drew attention to the similarity between the Indicators C1.1, *'Lessons are responsive to learner diversity'*, and C1.2 *'Lessons are made accessible to all learners'*. They suggested that they should be replaced with one. This reveals some necessary refinement to the English version. But the reaction may also be a result of this team working without the Questions associated with particular Indicators. The Questions help to define the meaning of the Indicators. In the construction of the Index there was a single Indicator which was split into two because of the large number of apparently distinct Questions that were associated with it. An attempt was made to arrange the Questions so that the Indicators reflect a distinction between access and participation.

B1.1, *'Staff appointments and promotions are fair'*, was not seen to apply to the Brazilian system. Appointments and promotion of teachers is not a school matter. Generally teachers wre assigned to the schools following public examinations. Where there is an element of choice, it has to do with distance from home or to fit in with other jobs; schools operate in shifts and most of the teachers work in one or two other schools.

Some teachers in the schools felt that B2.7 *'Pressures for disciplinary exclusion are decreased'* should not be an aim for their school. They felt that exclusion from class for disciplinary reasons was a good thing though not exclusion from the school.

Developing the work

The team had encountered a mixed reaction from the schools. Two schools were receptive, of which one expressed a willingness to engage fully in using an Index process adapted to their context. This school felt that the discussion brought out insights which would help them form a closer relationship with the families of learners and they devised a plan with the research team to implement these ideas. The second school found that the discussion raised important issues but wished to look at the materials in more detail before making a commitment to working with them. The third school argued that it was not yet time to engage with the materials. Within this school as in the others, the discussion was revealing for the researchers in bringing out barriers to the inclusive development of the schools.

The team feel that they need to do further work developing a Brazilian version of the Index in collaboration with the administration of the municipality where the schools are based. There had been a period of difficulty while there was a changeover of government which is always accompanied by new appointments at the local level. However, the newly appointed second in command in the Education Secretariat, with responsibility for teaching and learning development issues, is well known to them and is of like mind. They had built up a strong professional relationship with her in the previous twelve years. This would support the relationship that they had been trying to create between teachers in the project schools and the education administration. The school staff had felt resentment towards the administration who were not seen in the schools although this was beginning to change.

The South African team work in the central administration in a district of Gauteng Province. They gave a brief report on the reaction of colleagues to the Index in rural KwaZulu Natal, where the team had worked with schools on the identifying barriers to learning and participation and resources to support learning and participation. They felt that the current form of the Index needs considerable revision to make it relevant to their context. They then reported on preliminary work with the Index to assess its applicability in their province. They described the work on inclusive development in which they were already involved, how they investigated the Index, the barriers they encountered to its use and opportunities to develop it further.

They had been working with the Index approach to inclusion through their work on the Four Nation Project. This approach had become the basis of the work of the District Inclusion Task Team. They had tried to move away from the language of special educational needs and had adopted notions of barriers to learning and participation. They had established community and 'site of learning' based support teams which focused on supporting teachers rather than individual children. They were trying to address the whole school and classroom context. They recognised that it was difficult to move away from practices embedded in the medical model. However, they found this to be much easier in schools in disadvantaged areas where there is much more of a sense of community and where there have been no specialised services.

There is a national policy on school development planning which requires every school to produce and submit each year, a three year development plan. The Gauteng Department of Education has a programme of training schools on school development planning and the implementation is monitored through follow up training and frequent school visits.

The Inclusion Task Team in their district worked intensively for a day with people from various areas of the administration, including the director, inspectors and advisers involved with institutional development, early childhood development, curriculum and support services, representatives of teacher unions and school principals from four of the Four Nation Project schools.

Reactions to the framework, Indicators and Questions

The participants in the South African workshop saw the Index as 'a very powerful document' which could help to make the necessary challenges to schools and support their development. They confirmed the relevance of the concepts and framework. The workshop operated on two levels, looking at the potential of the Index as an instrument to be used by schools but also as an opportunity to reflect on cultures, policies and practices in the team and in the district office.

Some of the Indicators and Questions were thought to be too long and the language too complicated. For example, the Question, *'Do learners understand that different degrees of conformity to school rules may be expected from different learners'* was difficult to understand but most felt strongly that the sense of it should be retained. In general, quite a lot of work was needed to simplify the language, remove jargon and replace issues which are

specifically about the English system with corresponding features of the South African system. Such words as 'supply staff', 'Code of Practice', 'setting', needed to be changed.

People expressed a dilemma about whether the references to highly resourced contexts such as chess clubs, computer rooms, halls, canteens, sign language interpreters and Brailling facilities would alienate people in disadvantaged settings or whether they should be retained as something to which everyone eventually has a constitutional right. But there was also a need to keep in mind the diversity of context, including the urban advantaged schools.

There was a recognition that curriculum policies in South Africa are meant to encourage many of the practices set out in Dimension C, evolving inclusive practices, and that the Index was a good way of monitoring their adoption.

Many Questions gave rise to discussions around "race". and this suggested that this issue might be elevated to the status of an Indicator on its own in South African schools. This paralleled the discussion around "caste" in India. Certain Indicators and Questions gave rise to heated debates and passionate disclosures of previous exclusion. Under the Indicator, A.1.4: *Staff and learners treat one another with respect,* there is a Question: 'Do staff address all learners, respectfully, by the name they wish to be called, with the correct pronunciation'. This sparked off a discussion for at least half an hour. Most black participants in the South African workshop said that no white person ever had the intention of pronouncing their name correctly. In the past many white people had referred to Indian South Africans as Coolies and Black South Africans as Kaffirs. In the aftermath of apartheid many discriminatory practices persist in schools even if they are lessening. Similarly, the group stressed the importance of the Question 'Do staff treat each other with respect irrespective of their roles in the school?' under the Indicator, A1.3: 'Staff collaborate with each other'.

Barriers to introducing the Index
The team raised the issue of initiative overload in a way that parallels the situation in England. Many in the schools and in the administration felt overwhelmed by new initiatives and there was an urgent need to co-ordinate them. There was considerable pressure to improve matriculation results and the number of learners passing with distinctions, to engage in whole school development , to review and evaluate the implementation of the new 'Curriculum 2005', to review the introduction of continuous assessment and engage in school governing body training. Under the 'school safety programme' schools had to look at policies on the misconduct of learners, combating violence, child abuse, racism, substance abuse, and involving communities to establish peaceful environments. The District was also pushing forward the Health Promoting Schools Initiative.

If we come with an Index project which they see as another project they begin to express unwillingness to participate and the very people in offices seen as driving it forward have many other commitments. They are not available to carry forward the training in the schools. When colleagues [who were meant to explore the possibilities of the Index] came back from Manchester [where they agreed to work on it], it was the exam period and immediately they were involved in monitoring examinations.

While in theory the Index should be integrated into school development planning, in fact the implementation of the school development programme was imminent and would go ahead before a South African version of the Index could be developed. The Index would have to be integrated into practice on a less grand scale.

The South African system like others around the world was being influenced by economic policies which limited spending on social programmes. This was having a negative impact on programmes of social transformation.

Opportunities to implement the Index

The Index would be best implemented if the Provincial and National Department of Education were involved and if it could then be linked with the national processes of school self-evaluation and school development. The strong teacher union movement in South Africa were potential allies since they support movements towards inclusion, which they relate to their continued concern to carry forward social transformation.

The Index fitted well with the post-apartheid emphasis on participation and bottom-up involvement in development. Nevertheless there was a dependency culture too where schools were looking to the administration to resolve their day-to-day problems. It was felt that the Index could be used to encourage independence, to get past the superficiality of the development plans produced in some schools, and to broaden the process in those schools where the plan is produced by the head teacher without consultation with other staff.

CONCLUDING DISCUSSION

The lessons of the work in the three countries are drawn together in the concluding summary in Section 6. Here it is worth emphasising what was learnt about translation, the significance of the Index process in working with schools, and the starting points for those initiating this engagement.

> *In general for me it feels so British it feels like something was developed for a British context, the language, the issues and the emphasise of the Indicators.*

Translation is important for all countries even where English is a national language. An Index needs to encourage a sense of ownership by schools and those introducing it. In India and South Africa, some of the language of the Index was seen to be English English rather than South African or Indian, English. Colleagues found that there were aspects of the English system which did not have a direct parallel in their countries. The significance of translation was most keenly felt in Brazil where the process of exploring the materials could not begin before the time-consuming task of translation into Portuguese had been completed. This process might have been helped by the availability of a group of educators, fluent in both English and Portuguese, to help with the complex process of translation from one language and system into another. An unanticipated benefit of translating the Index for use with other countries has been the subtle differences in education system and culture that the process reveals.

The presentations also underlined the significance of the process for working with schools. The first encounter with the materials in some schools was in meeting withthe researchers. A gradual participative process which starts with the valuing of the knowledge and experience of staff of the barriers to learning and participation and the resources that might help to move things forward in their own setting, was replaced by exposure to Indicators and Questions sometimes highlighted what they were not doing and implied that they needed resources which were beyond their hopes. The way the materials are introduced is critical in gaining widespread engagement with them.

The English version of the Index was constructed so that it would be carried forward from within a mainstream school. At the workshop there were representatives of mainstream schools and the work they were going to take up promised to be important in helping to develop the Indian version of the Index. Several of the participants at the workshop were based within special schools. For some inclusion was very strongly associated with disability as the following exchange illustrated:

> Teacher 1: *We are always talking about disability when we talk about inclusion .... But inclusion is the totality of the development of the school – the children and the staff and the whole of the school...*

> Teacher 2: *Why is it so difficult to make that shift?*

> Teacher 1: *Maybe because we are starting this discussion with the backdrop of an institution which deals primarily with disability. Maybe that is the thing, we have a mental block here. We are just not defining inclusion outside of this arena.*

> Teacher 2: *Do you think it is possible?*

> Teacher 1: *Yes, why not? It will be difficult but it can be done.*

> Teacher 3 (from a mainstream school): *Even in our school many teachers didn't get a very clear picture. They thought inclusion means you are going to put disabled children in the school. But when we spoke to them we said it's not just about disabled children – it's about developing the school. The development plan and the inclusion of disabled children is just a part of it... before we talk about the Index there needs to be a lot of preparation in the mindset of the people*

> Teacher 4: *We are very eager to prepare for this change, but there is a gap somewhere. We do have positive attitudes that say we would like to look at the area of inclusion. But it also requires a certain framework of analysis and coming from the disability sector we may not all have that perspective which we require to look at the issue of inclusion at a much broader level. So perhaps what we need to do is work on developing that perspective together.*

In taking inclusion forward and in developing an Index those involved in special schools may need to make alliances, as has been done in India, with others concerned with 'Education for All', with local administrations and with teachers and head teachers working in mainstream schools.

The South African team spoke from the perspective of those working from within the provincial administration. Their need was for materials to be structured so that they could be used in helping schools to reach the point when they would take up inclusive school development on their own. There was a need for the Index to recognise all the different starting points particularly in a situation where many of the schools in most need of support in their development did not currently have the capacity to take it forward themselves.

There is no easy solution to ensure that schools will want to engage in developing more inclusive policies, cultures and practice. It is more likely that there will be support in a local administration to engaging in such a process if it is seen as part of an overall development strategy.The index can be a useful tool in this process, but it should not be seen as imposed from outside schools: it has to be made to fit in with other initiatives in which a learning centre is involved.

ADDITIONS TO THE INDEX:
INDICATORS AND QUESTIONS

A consideration of the variety of contexts in countries of the South, and the presentations on the Index from the Four Nation Project teams raised various issues that may not be sufficiently considered in the Index. In many countries there is a huge variation between the most well-resourced learning centres and those in the poorest communities. Education in the poorest communities may be provided by families and communities without the support of additional centres of learning. In an Index for countries of the South, much greater attention needs to be placed on supporting the provision of basic conditions for learning and on educational development within an area.

NEW INDICATORS

A preliminary list of additional Indicators was drawn up at a meeting of the core Four Nation Project team and presented to the workshop as a starting point for group discussion. There was a recognition that issues could be emphasised through their own Indicator or through inclusion under many Indicators. An aspect of an issue can be raised as an Indicator under one Dimension, while other aspects are raised under several other Indicators in the other Dimensions. Where there is already a reasonable level of awareness about an issue, sufficient attention might be drawn to it in one country by a Question. In another where it draws attention to a more significant and prevalent barrier to participation an Indicator may be required.

Delegates from South Africa felt that an Indicator which included reference to skin colour was important for their country whereas a participant from India suggested that reference to Caste, and skin colour, might permeate the Index by substituting for the term "race". Within any one country an issue might be of central importance for one centre of learning in one area but not for another learning centre in a different area.

Some participants suggested additional Questions to existing Indicators, such as the Question 'is the head teacher equally accessible to all staff? which might be added to an Indicator on staff development (B2.2) or to (A1.3) on staff collaboration. There were also further questions about staff promotions.

Private school, Mumbai

One group expressed particular concern about work that needed to be done on the preparedness of parents, staff and learners in the mainstream to include learners with impairments. In the English version of the Index, there is a Question about 'disability equality education' for staff, and there are 'Questions' about the responsiveness of

teaching to learners with impairments in the Section on Orchestrating Learning. The Indicator A.2.6: 'The *school strives to minimise discriminatory practices'*, is supported by Questions about overcoming negative attitudes to disability, and under Indicator A.2.2 *Staff, governors, learners, and parents/carers share a philosophy of inclusion*, staff are asked to challenge views about the limits to inclusion. It is a matter of judgement whether this permeation of the issue is seen to give it sufficient emphasis in a particular context.

That learners should be safe from attack was raised as particularly important by participants from South Africa. The Indicator on bullying could be strengthened in some contexts from *'Bullying is minimised'* to 'Threats to physical safety and all forms of bullying and abuse are minimised', with appropriate additions to Questions.

Following the discussion the revised list of potential Indicators was produced. These are listed below, with the Section in the English version of the Index to which it might be conntected:

- The learning centre engages in (inclusive) development planning/inclusive development planning. (B1)

- Staff develop basic conditions for teaching and learning. (C2)

- The school supports the development of literacy in its communities.(C2)

- The learning centre includes learners without regard to their economic circumstances.

- The learning centre seeks to promote the well-being of the whole learner.(A2)

- The learning centre collaborates to meet the health needs of all learners. (B2)

- All interventions from outside the school (NGOs, Local administration, voluntary bodies) support the inclusive development of learner centre cultures, policies and practices. (B2)

- The language in which lessons are taught is not a barrier to learning and participation. (C1)

The list was not exhaustive. There was some concern, for example, that further attention needed to be paid to the nature of the curriculum and on overcoming discrimination based on gender. After agreeing upon the list, the workshop was divided up into groups working on the Questions that would come under each of suggested Indicators.

The learning centre engages in (inclusive) development planning

The development of *inclusive* development planning relies on the capacity of schools and area administrations to engage in development planning itself. It was clear that this could not be assumed in many areas within countries of the South, but it was also increasingly recognised that the absence of a clear development strategy in some schools was impeding the introduction of the Index in countries of the North.

Working within a budget.

The budget was allocated from the centre to the district, and from the district to the schools, for development. The school had a reasonable budget, running into a few hundred thousand rupee.....what happened was, the school wanted to plants a few trees in the compound and each of those saplings would cost 20 rupees. But the community said, 'it is not related to the school' and if we go through the instructions it does not say we can develop the school compound. So they didn't want to spend 20 rupees because they didn't think it was a developmental issue. Then the same thing happened for having meetings with the parents and the community – budgeting for that meeting was just one hundred cups of tea which was 200 rupees. But these small things kept adding and the District kept saying, 'You know the people have no idea about the budgets – they're under-spending – they're not developing the schools as they should be developed'.

Questions
- Is the capacity of the learning centre to engage in development planning being increased?
- Is there a development plan which specifies how the learning centre might be developed in the next year and in subsequent years?
- Is a learning centre budget included in the development plan?
- Does development planning involve all sections of the learning centre rather than only the head or senior staff?
- Is there a planning committee representative of all staff?
- Is the community represented on the planning committee?
- Does the planning committee meet regularly?
- When the committee meets is its work constructive ?
- Is planning and priority setting based on what is really going on in the learning centre and what can be realistically changed?
- Is planning and priority setting accompanied by a clear implementation strategy?
- Are the plan and priorities regularly revised ?
- Is planning done on a regular basis?
- Are the community involved in assessing the success of implementation in a process of continuous evaluation?

Staff develop basic conditions for teaching and learning.

It was clear that this was an important starting point for many learning centres, and might link to other areas such as the curriculum in the first phases of supporting the inclusive development of learning centres. In compiling the Questions it was felt that some would not apply in some contexts. Where learning arrangements are created to support the learning of nomadic learners, there may be flexible attendance at a learning centre which itself may move.

Pre-school outside of Chennai

Questions

- Are teachers present in the learning centre for the start of the day?
- Are teachers present in the classroom for lessons?
- Do teachers have the knowledge and skills to teach the learners they are expected to teach?
- Is teacher training of appropriately high quality?
- Are there enough teachers?
- Are absent teachers replaced by stand-in teachers?
- Is there space in the classroom for class work and group work?
- Do learners arrive at learning centre on time?
- Do learners stay in class during lesson time?
- Do learners stay at learning centre for the learning centre day?
- Do learners arrive at the learning centre hungry?
- Are sufficient meals provided?
- Is there enough air, light and ventilation in classrooms?
- Are there enough textbooks?
- Are learning materials culturally relevant?
- Is the content of lessons relevant to the background and interests of learners?
- Are children encouraged to make use of locally found materials as a resource for learning?

- Do teachers discriminate against learners who are different in background from themselves?
- Are children actively involved in their learning?
- Are teachers given choices about where they teach?
- Does education relate to the needs of the local economy?
- Is education participation organised so that it does not further impoverish families?
- Are learning centres a resource for parents to also be learners and to be teachers?
- Does the local administration avoid taking teachers away from learning centre for other work (for example on the national census)?

The learning centre supports the development of literacy in its communities.

This issue was included so that educational development in poorer areas can be linked with the provision of basic education within its surrounding communities. There were issues of definition here as the reporter from the group indicated: *'Literacy for us is like the basic three Rs. But this is not a universal concept, in some of India if you can sign your name and go to the bank to withdraw a cheque you are literate. But that really isn't literacy.'*

Questions
- Does the learning centre have programmes to promote literacy in the community?
- Are community languages and community literacy skills valued in literacy programmes?
- Are literacy programmes linked to community strengths with oral language including stories and songs?
- Are literacy programmes linked with the development of political participation?
- Does the learning centre involve families in developing literacy for its learners?
- Does the learning centre hold classes for adult literacy?
- Does the learning centre through its staff and learners participate in literacy programmes conducted by other agencies?
- Does the learning centre involve its learners, its literate parents, or volunteers, in these programmes?
- Does the learning centre follow a planned curriculum for literacy?
- Is a literacy programme based on knowledge of the extent of need?
- Is the programme supported through voluntary monetary and teaching contributions?
- Are these programmes a part of the curriculum of the learning centre?
- Are literacy programmes evaluated?

The learning centre includes learners without regard to their economic circumstances.

The inclusion of this Indicator raises important issues for most countries, since they have private learning centres which exclude children because they are unable to pay fees. Even within the state sector learning centres in some countries may charge an apparently small fee, which serves to exclude families in extreme poverty. Poverty is the most prevalent form of exclusion. One participant mentioned an example from Indian learning centres where access to computers was written into the admissions policy for a learning centre.

Questions
- Are children from the locality admitted to the learning centre irrespective of economic circumstances?
- Is access to a computer or other technical equipment used as a criterion for admission to learning centre?
- Are parents welcomed into the learning centre irrespective of their economic circumstances?
- Is there financial assistance for learners if required?
- Are girls as able to gain access to the learning centre as boys?
- Is attention paid to the nutritional needs of the children?

Girl helping out the parents in the market, Mumbai

- If children get financial assistance, is it confidential so that their dignity and privacy are respected?
- Are there support systems after learning centre hours to meet the academic and social needs of the learners if required?
- Does the learning centre avoid learner 'push out' and 'pull out' because of pressures from the family due to poverty?
- Is additional support available to compensate for a family who loses a wage-earner?

The learning centre seeks to promote the well-being of the whole learner.

It was accepted that this Indicator was equally applicable to countries of the North and the South and was not considered in the English version of the Index. The Index does not mention spirituality, or beauty or love yet there was agreement that the consideration of these ideas should be considered in the education of whole people. It was also acknowledged that learning should often be fun, joyful and accompanied by laughter. Education might also include tears.

Questions
- Do staff provide for the physical well-being of the child?
- Are there health care programmes involving care, education and the awareness of health issues?
- Is respect for all religions encouraged?
- Is respect for those with no religion encouraged?
- Is the spiritual development of learners fostered?
- Is innovation valued from both learners and teachers?
- Do learning centres nurture the emotional needs of learners?
- Are learners helped to develop a positive self-concept?
- Is attention given to the building of character?
- Are learners taught an appreciation of the beautiful?
- Does the learning centre promote respect, acceptance and appreciation of cultural diversity?

The learning centre collaborates to promote the health of all learners and their families
This is an area that is potentially vast and might involve more than one Indicator in order to integrate the work on an Index for inclusion with work on health, for example the World Health Organisation's, 'Healthy Learning centres Initiative'. Education has to contribute to the maintenance of health in learners and their communities and many learning centres are also health centres. Illness can have a dramatic effect on the continuity of education for learners because of their own or their teachers' illness. AIDS is of great concern in Brazil, India and South Africa. In South Africa, a third of all teachers are expected to die of AIDS. But deaths due to other illnesses such as malaria or tuberculosis are far higher in many areas. A South African participant commented:

Health has to be a whole Section in South Africa . We need a range of Questions around HIV/AIDS which we must include in the Index. How do we support AIDS orphans? How do we support teachers who are absent because of disease?

Questions
- Does the learning centre seek to promote health in children and their families?
- Is health promotion an essential part of the curriculum?
- Are there nutritional programmes for the learners?
- Are there sexuality education programmes for the learners?
- Are learners given regular health assessments?
- Are learners given regular dental checks (once a year) and care?
- Are learners involved in promoting health in their communities?
- Are concerns over children's health discussed with parents?
- Do staff and parents collaborate over health intervention?
- Are health therapists involved as staff in the learning centre?
- Do learners contribute to promoting health in their communities?
- Does a mother's health and level of awareness affect the health status of the family?
- Is the health of a female child treated as of equal importance to the health of a male child?
- Do the local government authorities contribute to maintaining the health of children according to need?
- Are learners sensitised to the fact that different learners have different health needs?
- Are staff and learners informed so that they can take necessary precautions to avoid disease?
- Are staff and learners informed so that they can avoid prejudice against learners who may have a disease or be HIV positive?
- Are staff who are ill supported by the learning centre?

B2 All interventions from outside the learning centre (NGOs, local administration, voluntary bodies, support services) support its inclusive development.
While particular aspect of this Indicator, such as non-governmental organisations, reflect features of countries of the South, the concern that interventions from outside a learning centre should be co-ordinated and support its inclusive development apply in all contexts. Again this is a

potentially large area. There is an Indicator in the *Index, B2.1 'All forms of support are co-ordinated'*. but additional issues need to be mentioned. There is a particular need in all countries for initiatives to be co-ordinated. Those involving themselves with learning centres have a responsibility to ensure that their interventions support their learning centre development aims. As one participant put it: 'We agree – basic groundwork is necessary before just jumping in.' Having an Indicator or Indicators on these issues can be a starting point for a learning centre to influence its relationship with external agencies.

Questions
- Do staff convey an inclusion philosophy to external services?
- Is there a clear plan for the way external services can contribute to the inclusive development of cultures, policies and practices?
- Are there clear responsibilities for co-ordinating external interventions?
- Do all those offering support to the learning centre ensure that their activities are co-ordinated their activities with other overlapping initiatives?
- Does the local authority collaborate with and monitor intervention from NGOs?
- Do external interventions increase the capacity of the learning centre to respond to diversity?
- Does the learning centre approach additional sources of services?
- Are staff in the learning centre aware of all the services that can support the learning centre?
- Does the learning centre receive support from the local authority to access all available services?
- Does the learning centre receive support for staff development and training?
- Does training increase the knowledge and competence of staff?
- Does the local authority provide appropriate follow-up support after training initiatives?

The language in which lessons are taught is not a barrier to learning and participation.
This was an example of an issue permeating the English version of the Index, which might require a separate Indicator in some countries where it needs to be given additional emphasis such as in some multi-lingual countries of the South. In many areas the language of instruction is a major barrier to learning and may account for high 'push out' rates.

Questions
- Are staff fluent speakers and writers in the language of instruction?
- Are some staff fluent in the home languages of learners?
- Do staff recognise the difficulties learners face when the language of instruction is different from their home language?
- Are all learner home languages given equal respect and status by staff?
- Do staff have the same high expectations of all learners regardless of their home language?
- Do teachers understand and attempt to minimise the problems learners face when they are unable to develop their concepts in a language which is readily accessible to them?
- Do teachers draw on the variety of learner home languages as a resource for teaching and learning?
- Are signs around the learning centre in the languages of the local community so that parents and others are made welcome?

- Is information about the learning centre available in the languages spoken in the local community so that parents and others may have access to it?
- Are teachers flexible and responsive in their use of different languages towards support staff, parents and learners?
- Are learners given opportunities to support each other's learning through a variety of languages?
- Are all staff meetings accessible to all staff?
- Are all parent/teacher meetings held in the parents' home language or otherwise with interpreters available?

6

CONCLUSION AND SUMMARY

There isn't a version of the Index which is the authorised version – an Index is created in the process of translating it to a particular setting. An Index is what each learning centre, or administration devise for carrying forward their own Cultures, Policies and Practices.

We can't make this Index, or any other Index, carry the weight, for changing our schools, and our societies. It can't do that. It's just paper. If the development of inclusive cultures, policies and practices is tricky, it's not the fault of the Index. There are deep processes in all our societies which push people out, which make people prioritise the education of their group over the education of the groups which are not their group.

The key factor determining the applicability of the Index in other learning centres in these other countries had less to do with cultural differences between countries, although these are very important, but with the resources that are available to learning centres. The country presentations emphasised the very great significance of this issue. In the analysis of relevance of the Indicators and Questions to learning centres in India, Brazil and South Africa, it was evident that the great majority of the Indicators and Questions of the present Index could be useful in those learning centres where development was already part of the culture and which were relatively well resourced. Those Indicators and Questions referring to specifically English issues needed to be changed but often there was seen to be an equivalent issue in the country concerned which would replace it.

The cultural as well as economic distances between the communities attending a private learning centre in a city and those in impoverished circumstances in the rural areas may be so vast as to make it difficult to consider that they share a single education system that can be supported by a single Index. In these circumstances the priority in developing an Index must be to make it work for the poorest children. It must not be another means to increase the gap between the advantaged and disadvantaged.

Pre-school, Dharavi, Mumbai

45

The workshop discussion reinforced the need for a set of materials in countries of the South, which address basic conditions for teaching and learning, and for introducing the notion of learning centre development itself. Other important issues arising from Section 5, besides economic disadvantage, included the increased role of learning centres in promoting health in economically poor areas, working with non-governmental organisations, language of instruction and the well-being of the whole learner. Issues of gender were not considered separately in the workshop but given the widespread discrimination against girls in education in many countries this issue might be given the status of an Indicator. It is again a matter of judgement whether the issue is emphasised more by permeating it through the Index than through a single Indicator, *provided it is already understood as a key issue.* It was also noted that more attention might be paid to the nature of the curriculum. The irrelevance to learners of what is taught can be a major barrier to learning and participation. This can be handled at a general level under conditions for learning but it may need to be given detailed separate emphasis.

In an Index for countries of the South the process of inclusive development needs to be given even more emphasis than it is currently. The start of the process involves broad consultation which draws on existing knowledge about the barriers to learning and participation and the resources that can be mobilised to support learning and participation in the learning centres and its communities. The next stage involves the setting of priorities and the engagement with development. Detailed resources, as in the English version, are there to support this process.

An Index is a set of materials to support learning and participation in centres of learning. This does not mean it has to provide all the materials to support such development. It is important in any future versions of the Index to define its role and link it to other materials that are complementary to it. For example, there has been considerable demand for materials which support the inclusive development of local administrations and a number of groups are working on these currently in England.

SUMMARY OF MAIN POINTS OF THE WORKSHOP

Building on the workshop
• The development of an Index of relevance to the diverse contexts in Brazil, South Africa and India should be pursued.

• The experience of developing an Index with Brazil, South Africa and India, including this workshop, should be drawn upon in producing versions of the Index for use with other countries of the South.

Lessons for all countries
• The Index has been found to be of considerable use in all countries.

• The key concepts, review framework, and participative process would help to structure inclusive development in any country.

• The process of introducing an Index should always be participative and start from a structuring of what people already know about a learning centre and how it might be developed.

• In all countries it is important that inclusion is concerned with all learners and is linked with the development of the education system in general.

• It is important to link an Index with other local or national initiatives on learning centre development, health and social welfare.

• In shaping an Index there needs to a careful review of the particular barriers to learning and participation and the resources to support learning and participation in the variety of contexts in a country.

• Care needs to be taken to include Indicators and Questions which challenge barriers to learning and participation and discriminatory practices in learning centres and education systems.

• The Index requires adaptation for use in any country because of differences of system and culture and the importance of encouraging ownership of the process by learning centres.

• Limited changes to the Indicators and Questions are required for countries of the North.

• A process of translation is involved even when English is a national language in another country.

• The translation of the Index for use in another country provides a means for exploring subtle differences of culture and education system.

• A version of the Index for a particular country should be accessible to those speaking the variety of languages of that country.

• Consultation with users is important for any new 'translated' version to ensure that its meanings are clear.

Adaptations in countries of the South
• The presentation of an Index, and the Indicators and questions require considerable adaptation in countries without universal education and where there is widespread poverty.

• An Index should provide examples of how it can be used to support the range of education settings.

• Limited changes to the Indicators and questions are required for well resourced settings in countries of the South.

• New questions and Indicators are required for settings where resources are limited.

• Particular attention needs to be paid in some areas to developing basic conditions for teaching and learning and to encouraging a process of education development.

• Great emphasis needs to be placed on building on existing knowledge in a learning centre in a participative way using the concepts of barriers to learning and participation and resources to support learning and participation.

• Those involved in introducing an Index in countries of the South have to ensure that it does not only benefit learning centres in economically advantaged areas.

• The first responsibility of those devising an Index in a particular country is that it should support development in learning centres in economically poor regions.

• Stereotyping of economically poor areas as, for example, lacking in community and teacher strengths must be avoided.

• The strengths of some learning centres in economically poor areas in including all learners from the local community should be recognised.

Beyond the learning centre
• An Index might include recommendations for the inclusive development of local and national policy, the work of local government, NGOs and teacher training institutions.

• The Indicators and questions in a particular country may be of particular use in planning educational development by national governments, local governments and NGOs and teacher education institutions.

• In introducing an Index attempts should be made to integrate it with other local and national initiatives.

• An Index should contain details of how it can be introduced into mainstream schools from a range of settings.