EQUITY AND INCLUSION TOOL
UNGEI/FAST TRACK INITIATIVE
The problem

- Education sector plans generally do not pay adequate attention to identifying and addressing issues of equity and inclusion;
- Gender is not explored in relation to other dimensions of disadvantage and exclusion;
- Issues identified include education of children with disabilities; ethnic minorities, OVC, socially/economically marginalised etc;
- Problem revealed in both sector analysis and in response/interventions.
Purpose of the tool

- To support the integration of equity and inclusion issues in the development, revision and appraisal of education sector plans;
- To support a more holistic approach to addressing educational disadvantage in sector planning;
- To foster policy dialogue;
- To complement other tools available for the FTI processes.
Equity and Inclusion

- Equity is related to securing all children’s rights to, within and through education so they can realise their potential and aspirations;

- Inclusion is a process of addressing and responding to the diversity of needs of all learners through increasing participation in learning, cultures and communities and reducing exclusion within and from education (UNESCO, 2005).
Objectives

- To help planners ask the right questions;
- Strengthen understandings of equity and inclusion issues;
- Help identify appropriate evidence-based interventions to address challenges of inequity and exclusion;
- Help prioritise interventions to improve equity and inclusion.
The Tool

- The tool focuses on 15 critical questions across the key areas of education sector review planning identified from a documentation review. There are 3 columns.

- Questions in **Column A** support the situational analysis of equity and inclusion in the sector.

- **Guidance is provided in Column B on answering those questions.**

- Questions are asked in **Column C** of the tool to help strategic thinking and decision making for planning.
Users

- Governments (Ministries of Education);
- Development partners;
- Civil society/NGOs.
Gender is mainstreamed in the tool

- In baseline data on access of disadvantaged groups;
- In identifying barriers to access/quality;
- In policy and strategy analysis;
- In institutional/capacity/management analysis;
- In the sections that look at schools, parental and community participation, teachers and the curriculum;
- In guidance for preparing/revising the sector plan.
Field testing took place in 3 countries in 2009. Lesotho, Kyrgyz Republic and Malawi.

The piloting process investigated the following in planning workshops:

- **User-friendliness.** Is the tool sufficiently easy to use?
- **Relevance.** Does the tool ask the right questions?
- **Coverage.** Does the tool enable the participation of all relevant stakeholders? Who feels they can usefully use the tool? Does it cover the right issues?
- **Adequacy.** Does the tool generate the right data? Does it facilitate a useful process for stakeholder dialogue on equity and inclusion policy and strategy?
- **Added value.** Does the tool add value to the plan preparation, review, and appraisal processes? What was done differently or better as a result of using the tool?
Outcomes of the Pilot Process

• The tool was generally well received in all three countries.

• The tool provides a means of undertaking a comprehensive assessment of equity-related issues.

• There was broad endorsement on the usefulness and relevance of a tool that focused on issues of equity and inclusion.

• The question format was welcomed.
Key findings 1

- The need for a holistic approach to analysing educational equity issues and the lack of a suitable framework or lens this prior to the introduction of the tool. This arises from the multiple deprivations (e.g. gender and disability) that are characteristic of educational disadvantage;

- The value of the availability of a comprehensive stock taking review of sector performance to inform dialogue and decision-making.

- The need to go beyond national educational statistics and the importance of obtaining and using disaggregated statistical data including by gender, region/district and economic quintile to understand educational inequalities;
Key findings 2

- Educational disadvantage is not simply a matter of disadvantaged population groups, it is also a consequence of a lack of rural development and opportunity, which is particularly pronounced in remote areas;

- The importance of research evidence of the root causes of school drop out and reviewing the effectiveness of strategies to address these;

- Ongoing difficulties in responding effectively to HIV, both in terms of preventive education and the needs of children living with or affected by HIV;

- Complexities in addressing child labour and the need for a multi-sectoral government response;
Key findings 3

- Lack of adequate support for the education of children with disabilities, especially those with severe disabilities;
- The need for more in-depth assessments of specific issues (e.g. in gender, child labour and HIV) where these are key issues;
- The importance of highlighting all relevant policies in the education sector plan and ensuring the plan includes activities to disseminate and implement such policies;
- The need to set standards for schools in terms of equity and inclusion.
Conclusions

The tool is useful for

- Undertaking a stock taking or situation analysis;
- Policy dialogue;
- Advocacy and awareness raising;
- Strategic planning;
- Supporting the mainstreaming of gender.
Next Steps

- The tool has been revised in the light of feedback obtained from piloting;
- Work is ongoing to make it more user friendly;
- The finalised tool will need to be disseminated, discussed and piloted in new countries.