

#### NZJES SPECIAL ISSUE: EOUITY AND DIVERSITY

# Diversity and Equity: A Global Education Challenge

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Abstract This article sets out the international context for this special issue on equity and diversity. Tracing the development of the United Nations' policy 'Education for All' since 1990, it notes the struggles that have gone on to ensure that this is, in fact, concerned with all children, whatever their characteristics and circumstances. This inclusive vision was recently endorsed by the Incheon Declaration, which emerged from the World Forum for Education in 2015. A groundbreaking document, it makes a commitment to address all forms of exclusion and marginalisation. In so doing, it points to the need to focus efforts on the most disadvantaged learners to ensure that no one is overlooked. Bearing this new international policy in mind, the article draws on findings from the author's own research in order to suggest an overall agenda for change, focusing on national policies for equity and the development of inclusive school practices.

**Keywords** Agenda for change · Equity · Policy · Practice

## Introduction

Since 1990, the United Nation's Education for All (EFA) movement has worked to make quality basic education available to all learners (Opertti et al. 2014). Reflecting on progress over the 15 years that followed, a recent Global Monitoring Report points out that, despite improvements, there are still 58 million children out of school globally and around 100 million children who do not complete primary education (UNESCO 2015). The report goes on to conclude that inequality in



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education has increased, with the poorest and most disadvantaged shouldering the heaviest burden:

The world's poorest children are four times more likely not to go to school than the world's richest children, and five times more likely not to complete primary school. Conflict remains a steep barrier, with a high and growing proportion of out-of-school children living in conflict zones. Overall, the poor quality of learning at primary level still has millions of children leaving school without basic skills (p. ii).

Whilst this situation is most acute in the developing world, there are similar concerns in many wealthier countries, as noted by the Organization for Economic Co-operation and Development (OECD):

Across OECD countries, almost one of every five students does not reach a basic minimum level of skills to function in today's societies (indicating lack of inclusion). Students from low socio-economic background are twice as likely to be low performers, implying that personal or social circumstances are obstacles to achieving their educational potential (indicating lack of fairness) (2012, p. 9).

In responding to these challenge there is growing interest internationally in the use of strategies that places an emphasis on the power of market forces to improve educational standards (Lubienski 2003). In particular, a number of national education policies are encouraging schools to become autonomous; for example, in Australia, the independent public schools; the academies in England; charter schools in the USA; the voucher reforms in Chile; concertado schools in Spain; and free schools in Sweden. In New Zealand, partnership schools have been introduced.

Alongside this emphasis on school autonomy is a focus on parental choice. This usually takes place within education systems where high-stakes testing systems are intended to inform choice, whilst at the same time driving improvement efforts (Au 2009). In addition, narrowly defined measures of effectiveness are used for purposes of accountability (Schildkamp et al. 2012), implying that education is a private good rather than a public good.

Such developments have the potential to open up possibilities to inject new energy into the improvement of education systems. On the other hand, there is growing evidence from a range of countries that they are leading to increased segregation that further disadvantage some learners, particularly those from economically poorer backgrounds (Pickett and Vanderbloemen 2015). So, for example, talking about the development of charter schools in the USA, Kahlenberg and Potter (2014) suggest they have led to increased segregation in school systems across the country. Other researchers point to similar patterns in Chile (McEwan and Carnoy 2000) and in Sweden (Wiborg 2010). Meanwhile, recent developments in England's second city, Birmingham, have illustrated the potential dangers of so-called independent state schools being taken over by extremist elements within a community (Kershaw 2014).



There are, however, countries that have made progress in addressing the challenge of equity using a much more inclusive way of thinking, rather than relying on market forces:

.... the highest performing education systems across OECD countries are those that combine quality with equity. Equity in education means that personal or social circumstances such as gender, ethnic origin or family background, are not obstacles to achieving educational potential (fairness) and that all individuals reach at least a basic minimum level of skills (inclusion). In these education systems, the vast majority of students have the opportunity to attain high level skills, regardless of their own personal and socio-economic circumstances (OECD 2012, no page given).

To take an example, in Finland—the country which regularly outperforms most other countries in terms of educational outcomes—success is partly explained by the progress of the lowest performing quintile of students who out-perform those in other countries, thus raising the mean scores overall on the PISA tests (Sabel et al. 2011). This has also involved a much greater emphasis on support for students within mainstream schools, as opposed to in segregated provision (Takala et al. 2009). The implication is, therefore, that it is possible for countries to develop education systems that are both excellent and equitable (Schleicher 2010). The challenge for practitioners and policy-makers is to find ways of breaking the link between disadvantage and educational failure.

#### **Inclusion and Fairness**

Taking a lead from the OECD, I take equity to be concerned with inclusion and fairness. It is a concept that can be used to guide a process of strengthening the capacity of an education system to reach out to all learners in the community. This means that it must be seen as an overall principle that guides all educational policies and practices, starting from the belief that education is a basic human right and the foundation for a more just society.

In order to realise this right, the EFA movement has worked to make quality basic education available to all learners (Ainscow and Miles 2008). An emphasis on fairness and inclusion takes the EFA agenda forward by finding ways of enabling schools to serve all children in their communities, with a particular focus on those who have traditionally been excluded from educational opportunities—such as learners with impairments, children from ethnic and linguistic minorities, and so on.

The EFA Declaration agreed in 1990 set out an overall vision: universalising access to all children, youth and adults, and promoting equity. It is about being proactive in identifying the barriers some groups encounter in attempting to access educational opportunities. It is also about identifying all the resources available at national and community level and bringing them to bear on overcoming those barriers. This vision was reaffirmed by the World Education Forum meeting in Dakar, 2000, held to review the progress made in the previous decade. The Forum declared that EFA must take account of the needs of the poor and the disadvantaged,



including working children, remote rural dwellers and nomads, and ethnic and linguistic minorities, children, young people and adults affected by conflict, HIV/AIDS, hunger and poor health; and those with special learning needs.

Meanwhile, a major impetus for inclusive education was given by the World Conference on Special Needs Education in 1994. More than 300 participants representing 92 governments and 25 international organizations met in Salamanca, Spain to further the objective of Education for All by considering the fundamental policy shifts required to promote the approach of inclusive education, namely enabling schools to serve all children, particularly those defined as having special educational needs (UNESCO 1994). Although the immediate focus of the Salamanca conference was on what was termed special needs education, its conclusion was that:

Special needs education—an issue of equal concern to countries of the North and of the South—cannot advance in isolation. It has to form part of an overall educational strategy and, indeed, of new social and economic policies. It calls for major reform of the ordinary school (UNESCO 1994, p. iii–iv).

The aim, then, is to develop 'inclusive' education systems. This can only happen, however, if local area schools become more inclusive—in other words, if they become more capable of educating all children in their communities. The Salamanca conference concluded that:

Regular schools with [an] inclusive orientation are the most effective means of combating discriminatory attitudes, creating welcoming communities, building an inclusive society and achieving education for all; moreover, they provide an effective education to the majority of children and improve the efficiency and ultimately the cost-effectiveness of the entire education system (UNESCO 1994, Statement, p. ix).

As this key passage indicates, the move towards inclusive schools can be justified on a number of grounds. There is an educational justification: the requirement for inclusive schools to educate all children together means that they have to develop ways of teaching that respond to individual differences and that therefore benefit all children; a social justification: inclusive schools are able to change attitudes to difference by educating all children together, and form the basis for a just and non-discriminatory society; and an economic justification: it is likely to be less costly to establish and maintain schools which educate all children together than to set up a complex system of different types of school specialising in different groups of children.

The year 2016 is particularly important in relation to the future of the EFA movement. Building on the Incheon Declaration agreed at the World Forum on Education in May 2015, we have recently seen the publication by UNESCO of the Education 2030 Framework for Action. This emphasises inclusion and equity as laying the foundations for quality education. It also stresses the need to address all forms of exclusion and marginalisation, disparities and inequalities in access, participation, and learning processes and outcomes. In this way, it is made clear that the international EFA agenda really has to be about 'all'.



## **National Policy**

Like all major policy changes, progress regarding equity requires clarity of purpose. I have previously argued that what is needed is an 'inclusive turn' (Ainscow 2007). This requires new thinking which focuses attention on the *barriers* often experienced by children with impairments that lead them to become marginalised as a result of contextual factors, as opposed to the categories a learner may or may not fall into. Furthermore, it is increasingly recognised that these same factors limit the progress of many more children who do not have impairments. The implication is that overcoming such barriers is the most important means of development forms of education that are effective for all children. In this way, inclusion and fairness become central themes for the overall improvement of education systems.

Certain factors have the potential to either facilitate or inhibit the promotion of inclusive practices in schools. These are all variables which national and, to varying degrees, local district administrations, either control directly, or over which they can at least exert considerable influence. Some of these factors seem to be potentially more potent; in other words, they are 'levers for change' (Ainscow 2005). Two factors, particularly when they are closely linked, seem to be superordinate to all others. These are: *clarity of definition in relation to the idea of inclusion*, and the *forms of evidence* that are used to measure educational performance.

When establishing a definition of inclusion for strategic purposes, our work suggests the following elements (Ainscow et al. 2006):

- *Inclusion is a process* That is to say, inclusion has to be seen as a never-ending search to find better ways of responding to diversity. It is about learning how to live with difference, and, learning how to learn from difference. In this way differences come to be seen more positively as a stimulus for fostering learning, amongst children and adults.
- Inclusion is concerned with the identification and removal of barriers
   Consequently, it involves collecting, collating and evaluating information from
   a wide variety of sources in order to plan for improvements in policy and
   practice. It is about using evidence of various kinds to stimulate creativity and
   problem-solving.
- Inclusion is about the presence, participation and achievement of all students Here 'presence' is concerned with where children are educated, and how reliably and punctually they attend; 'participation' relates to the quality of their experiences whilst they are there and, therefore, must incorporate the views of the learners themselves; and 'achievement' is about the outcomes of learning across the curriculum, not merely test or examination results.
- Inclusion involves a particular emphasis on those groups of learners who may be at risk of marginalisation, exclusion or underachievement This indicates the moral responsibility to ensure that those groups that are statistically most at risk are carefully monitored, and that, where necessary, steps are taken to ensure their presence, participation and achievement within the education system.



We have found that a well-orchestrated community debate about these elements can lead to a wider understanding of the principle of inclusion. Such a debate, though by its nature slow and, possibly, never ending, can have leverage in respect to fostering the conditions within which schools can feel encouraged to move in a more inclusive direction.

The search for levers draws attention to the importance of using evidence to monitor the impact of policies on children (Ainscow 2005). In essence, the argument is that, within education systems, 'what gets measured gets done'. Unfortunately, this means that in countries that value narrowly conceived criteria for determining success, monitoring systems can act as a barrier to the development of a more inclusive education system. All of this suggests that great care needs to be exercised in deciding what evidence is collected and, indeed, how it is used.

The starting point for making decisions about what to monitor should, therefore, be with an agreed definition of inclusion. In other words, there is a need to 'measure what we value', rather than what is often the case, 'valuing what we can measure'. In line with the suggestions made earlier, then, the evidence collected at the system level needs to relate to the 'presence, participation and achievement' of all students, with an emphasis placed on those groups of learners regarded to be 'at risk of marginalisation, exclusion or underachievement'.

# **Developing Inclusive Practices**

With this formulation as a guide, the research carried out by my colleagues and I suggests that there is a need for radical new thinking regarding how schools can be supported in developing their capacity for responding to learner diversity. Underpinning our proposals is the belief that differences can act as a catalyst for innovation in ways that have the potential to benefit all students, whatever their personal characteristics and home circumstances. We are also committed to drawing on effective practices that are usually there in schools.

Our research has led us to propose that responding to learner diversity should be viewed in relation to an 'ecology of equity' (Ainscow et al. 2012). By this we mean that the extent to which students' experiences and outcomes are equitable is not dependent only on the educational practices of their schools. Instead, it depends on a whole range of interacting processes that reach into the school from outside. These include the demographics of the areas served by schools, the histories and cultures of the populations who send (or fail to send) their children to the school, and the economic realities faced by those populations.

This suggests that in responding to student diversity it is necessary to address three interlinked sets of factors that bear on the learning of children. These relate to: within-school factors to do with existing policies and practices; between-school factors that arise from the characteristics of local school systems; and beyond-school factors, including the demographics, economics, cultures and histories of local areas. In the following sections I consider each of these in turn in order to develop my argument as to what needs to happen in order to strengthen the capacity of schools for responding to student diversity.



#### Within-School Factors

Our research suggests that 'schools know more than they use' (Ainscow et al. 2012). This means that the starting point for strengthening the capacity of a school to respond to learner diversity should be with the sharing of existing practices through collaboration amongst staff and through joint practice development. Our research also shows that this can be stimulated through an engagement with the views of different stakeholders, bringing together the expertise of practitioners, the insights of students and families, and the knowledge of academic researchers in ways that challenge taken-for-granted assumptions, not least in respect to vulnerable groups of learners (Ainscow et al. 2012). This can also stimulate new thinking, and encourage experimentation with alternative ways of working.

The evidence needed to create this stimulation can take many forms and involves a variety of techniques. What is common is the way it creates 'interruptions' in the busy day of teachers that lead to the sharing of practices and the generation of new ways of working (Ainscow et al. 2006). Much of our own work involves us in collaborating with teams of staff within schools in order to learn more about how to make this work within current policy contexts (Ainscow et al. 2016).

In terms of evidence, the obvious starting point is usually with the statistical information available in schools regarding attendance, behaviour and student progress. In recent years the extent and sophistication of such data have improved, so much so that the progress of groups and individuals can now be tracked in considerable detail, giving a much greater sense of the value that a school is adding to its students. If necessary, further relevant statistical material can be collected through questionnaire surveys of the views of students, staff members and, where relevant, parents and carers. However, statistical information alone tells us very little. What brings such data to life is when 'insiders' start to scrutinise and ask questions together as to their significance, bringing their detailed experiences and knowledge to bear on the process of interpretation.

At the heart of the processes in schools where changes in practice do occur is the development of a common language with which colleagues can talk to one another and, indeed, to themselves, about detailed aspects of their practice (Huberman 1993). Without such a language teachers find it very difficult to experiment with new possibilities. We have found that the use of evidence to study teaching within a school can help in generating such a language of practice (Ainscow et al. 2003). This, in turn, can help to foster the development of practices that are more effective in reaching hard to reach learners (Ainscow et al. 2006). Particularly powerful techniques in this respect involve the use of mutual lesson observation, sometimes through video recordings, and evidence collected from students about teaching and learning arrangements within a school.

An effective approach for introducing these techniques is lesson study; a systematic procedure for the development of teaching that is well established in Japan and some other Asian countries (Lewis et al. 2006). The goal of lesson study is to improve the effectiveness of the experiences that teachers provide for all of their students. The focus is on a particular lesson or activity, which is then used as



the basis for gathering evidence on the quality of experience that students receive. These lessons are called research lessons and are used to examine the responsiveness of students to the planned activities. In using this approach we have taken a further step forward by incorporating the views of students. Our research suggests that it is this factor, more than anything else, that makes the difference as far as responding to learner diversity is concerned (Messiou and Ainscow 2015).

The introduction of such approaches points to the importance of forms of leadership that encourage colleagues to challenge one another's assumptions about the capabilities of particular students. We know that some schools are characterised by 'inclusive cultures' (Dyson et al. 2004). Within such schools, there is some degree of consensus amongst adults around values of respect for difference and a commitment to offering all students access to learning opportunities. This consensus may not be total and does not necessarily remove all tensions or contradictions in practice. On the other hand, there is likely to be a high level of staff collaboration and joint problem solving, and similar values and commitments may extend into the student body, and into parent and other community stakeholders in the school. The implication is that senior staff must provide effective leadership by addressing these challenges in a way that helps to create a climate within which teacher professional learning can take place (Riehl 2000).

#### **Between School Factors**

Moving beyond what happens within individual schools, our research suggests that fragmentation within school systems can be reduced through collaboration between schools. We have also found that collaboration between differently performing schools can reduce polarisation within education systems, to the particular benefit of learners who are performing relatively poorly (Ainscow 2005, 2010; Ainscow and Howes 2007; Ainscow and West 2006; Muijs et al. 2011). It does this by both transferring existing knowledge and, more importantly, generating context-specific new knowledge.

Evidence from City Challenge in London and Greater Manchester suggests that school-to-school partnerships of various kinds can be a powerful means of fostering improvements (Ainscow 2015; Barrs et al. 2014; Claeys et al. 2014; Greaves et al. 2014; Hutchings et al. 2012; Kidson and Norris 2014). Most notably, we have seen how they led to striking improvements in the performance of some schools facing the most challenging circumstances. Significantly, we found that such collaborative arrangements can have a positive impact on the learning of students in all of the participating schools.

This is an important finding in that it draws attention to a way of strengthening relatively low performing schools that can, at the same time, help to foster wider improvements in the system. It also offers a convincing argument as to why relatively strong schools should support other schools. Put simply, the evidence is that by helping others you help yourself.

Having said all of that, it is important to stress that it is often difficult for schools to cooperate, particularly in a policy context within which competition remains as a



major driver. In addition, robust evidence as to the impact on student progress of such strategies is still rather limited (Croft 2015). Meanwhile, there are other difficulties that need to be addressed. For example: school partnerships can lead to lots of nonproductive time, as members of staff spend periods out of school; they might simply be a fad that goes well when led by skilled and enthusiastic advocates but then fades when spread more widely; schools involved in working collaboratively may collude with one another to reinforce mediocrity and low expectations; those schools that most need help may choose not to get involved; and some school leaders may become 'empire builders', who deter others from getting involved (Ainscow 2015). On the other hand, our research has pointed to the sorts of factors that make school partnerships effective (Ainscow 2015; Ainscow and Howes 2007).

## **Beyond School Factors**

Our research has also led us to conclude that closing the gap in outcomes—of all kinds—between those from more and less advantaged backgrounds will only happen when what happens to children outside as well as inside schools changes (Ainscow et al. 2012). This means ensuring that all children receive effective support from their families and communities, which in turn means ensuring that schools can build on the resources offered by schools and families, and support the extension of those resources.

In this respect, the development of schools' work with families and communities is vital. In particular, we have seen important examples of what can happen when what schools do is aligned in a coherent strategy with the efforts of other local players—employers, community groups, universities and public services. This does not necessarily mean schools doing more, but it does imply partnerships beyond the school, where partners multiply the impacts of each other's efforts.

With this argument in mind, my colleagues Alan Dyson and Kirstin Kerr are currently promoting (with the support of Save the Children) the development of 'children's communities'. These are area-based initiatives modelled partly on the Harlem Children's Zone in the USA, but also drawing on the long history of place-based initiatives in the UK (Dyson and Kerr 2013; Dyson et al. 2012; Kerr et al. 2014). This work is attempting to improve outcomes for children and young people in areas of disadvantage through approaches that are characterised as being 'doubly holistic'. That is to say, they seek to develop coordinated efforts to tackle the factors that disadvantage children and enhance the factors that support them, across all aspects of their lives, and across their life spans, from conception through to adulthood.

In common with many other area initiatives, children's communities involve a wide range of partners working together in a co-ordinated manner. Schools are key to these partnerships and may be their principal drivers. However, this is not simply about enlisting other agencies and organisations in support of a school-centred agenda. Children's communities are aimed at improving a wide range of outcomes for children and young people, including but not restricted to educational outcomes—much less, narrowly-conceived attainment outcomes. Health and well-



being, personal and social development, thriving in the early years, and employment outcomes are as important as how well children do in school. This arises not from a down-grading of attainment so much as from a recognition that all outcomes for children and young people are inter-related, and the factors which promote or inhibit one outcome are very likely to be the factors which promote or inhibit outcomes as a whole. As a result, their focus is the population of the area rather than the population of schools per se, and they may be led by non-educational organisations, such as housing associations or regeneration partnerships. Moreover, in contrast to previous initiatives, they are envisaged as being long-term, thinking in terms of a ten-year time horizon, and they are committed to acting strategically, basing their actions of a deep analysis of the area's underlying problems and possibilities.

Children's communities, however, are simply one of a range of initiatives that is emerging internationally to link schools and other agencies in area-based action. In the absence of co-ordination by central government, the idea of what is known in the USA as 'collective impact' is beginning to gain traction. In other words, the complex problems that beset schools in common with all public services in the context of diversity, inequality and disadvantage are seen as demanding multi-strand responses at the local level.

#### Conclusion

The research summarised in this paper points to the sorts of strategies that are needed in order to foster equity within education systems. These are based on the idea that schools have untapped potential to improve their capacity for improving the presence, participation and achievement of all of their students, particularly those from poorer backgrounds. The challenge therefore is to mobilise this potential. This reinforces the argument that school improvement is a social process that involves practitioners in learning from one another, from their students, and from others involved in the lives of the young people they teach. As I have explained, an engagement with differences can be a powerful catalyst for making this happen.

So, what might all of this mean for New Zealand? The articles in this journal point to some potential starting points for readers as they consider this question. In so doing, I suggest that they should consider further, more specific questions that emerge from the arguments I have put forward.

In terms of national policy:

- Is there a common understanding that equity (inclusion and fairness) should be seen as a principle that guides all education policies?
- Where are the areas of strength within the national education system that can be built on?
- What are the levers for change that can be used to move thinking and practice forward?
- What are the barriers to progress and how can these be addressed?

In terms of individual schools:



- Are teachers encouraged to innovate in their classrooms?
- Do teachers have regular opportunities to see one another working?
- Do teachers listen to and take account of the views of their students?
- Do colleagues spend time talking about the way they teach?

In terms of the contexts within which schools work:

- Do schools support one another in developing practice?
- Do schools turn to each other during times of difficulty?
- Do schools work with families in reaching out to all learners?
- Do schools mobilise the resources available in their local communities?

Those involved in taking this challenging agenda forward may find it useful to use the recently published resource pack, *Reaching Out to All Learners*, that I have developed with colleagues at the International Bureau of Education-UNESCO (available free at: <a href="http://www.ibe.unesco.org/sites/default/files/resources/ibe-crp-inclusiveeducation-2016\_eng.pdf">http://www.ibe.unesco.org/sites/default/files/resources/ibe-crp-inclusiveeducation-2016\_eng.pdf</a>). Drawing on international research evidence, these materials are intended to influence and support inclusive thinking and practices at all levels of an education system. Consequently, they are designed to be relevant to teachers, school leaders, district level administrators, teacher educators and national policy makers.

The resource pack is intended to be used flexibly in response to contexts that are at different stages of development and where resources vary. With this in mind, it emphasises active learning processes within which those who use the materials are encouraged to work collaboratively, helping one another to review and develop their thinking and practices. Extensive use is made of examples from different parts of the world to encourage the development of new ways to *reach out to all learners*.

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