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The pursuit of equity and inclusion as the norm of school focus for all: transitioning from compensatory to predominantly holistic approaches

Il perseguimento dell'equità e dell'inclusione quale norma di una scuola per tutti: la transizione dagli approcci compensativi a quelli prevalentemente olistici

Call

The article examines the evolution of reference models regarding factors influencing disabilities and Special Educational Needs (SEN) in school contexts, alongside the broader transition of educational settings from segregative to integrative and inclusive approaches in basic schooling environments. These models and choices have shaped empirical evidence and shifted the focus of education and training systems towards more inclusive environments, considering the impact of school contingencies on individual outcomes.

Moving forward, the analysis explores these contingencies and the dynamic interaction between individuals and their environments in shaping teaching and learning conditions and opportunities. The authors stress the importance of utilizing empirical evidence to develop strategies for teaching in inclusive school settings. This analysis covers all components of what is considered the pedagogical core for school environments, emphasizing the interconnectedness of these elements and their implications for practice and research.

In conclusion, the article reflects on the persistence of outdated or distorted scientific frameworks and reference data within the common discourse, highlighting the necessity of updating and differentiating them for research, education, and the training of school practitioners.

Keywords: inclusion | accessibility | special educational needs

L'articolo esamina l'evoluzione dei modelli di riferimento relativi ai fattori che influenzano le disabilità e i Bisogni Educativi Speciali (BES) nei contesti scolastici, insieme alla più ampia transizione dei contesti educativi dagli approcci segregativi a quelli integrativi e inclusivi negli ambienti scolastici di base. Questi modelli e scelte hanno plasmato l'evidenza empirica e spostato l'attenzione dei sistemi di istruzione e formazione verso ambienti più inclusivi, considerando l'impatto delle contingenze scolastiche sui risultati individuali.

L'analisi esplora queste contingenze e l'interazione dinamica tra gli individui e i loro ambienti nel plasmare le condizioni e le opportunità di insegnamento e apprendimento. Gli autori sottolineano l'importanza di utilizzare l'evidenza empirica per sviluppare strategie di insegnamento in contesti scolastici inclusivi. L'analisi copre tutte le componenti di quello che è considerato il nucleo pedagogico degli ambienti scolastici, sottolineando l'interconnessione di questi elementi e le loro implicazioni per la pratica e la ricerca.

In conclusione, l'articolo riflette sulla persistenza di quadri scientifici e dati di riferimento obsoleti o distorti all'interno del discorso comune, evidenziando la necessità di aggiornarli e differenziarli per la ricerca, l'istruzione e la formazione degli operatori scolastici.

Parole chiave: inclusione | accessibilità | bisogni educativi speciali

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Introduction

Our perceptions of others are deeply influenced by our unique perspectives, paradigms, prejudices, and knowledge. The capacity to reassess the significance and potential biases in our viewpoints molds our intervention models, sensitivities, and attentiveness. A recent study by Scior et al. (2020), for instance, highlighted that while the general public in numerous parts of the world broadly endorses the fundamental principle of inclusion for children and adults with intellectual disabilities, persistent negative attitudes prevail. Furthermore, the existence of high levels of stigma and denial of basic rights remains a stark reality in many places.

In the journey towards establishing truly inclusive environments for special educational needs (SEN) students, a critical examination of the scientific paradigms underpinning the study of their conditions, both within and beyond educational contexts, becomes imperative (Kefallinou et al., 2020). The trajectory towards educational inclusion has historical roots, traceable to figures like Seguin (1846) and Vygotsky (1931), gaining formal recognition with the Warnock report in 1978. This recognition stems from the understanding that diverse conditions, including disabilities, can lead to secondary challenges contingent on context. The concept of special educational needs is tied to students facing risks of disadvantage without sufficient attention. However, evolving societal norms and understanding render conventional definitions subject to change, replaced by inclusive customs embracing once-labeled “special” educational needs.

The creation of truly inclusive educational environments is a pivotal aspect of modern education, arising from the historical exclusion and discrimination faced by students with disabilities in mainstream settings (Ainscow, 2020). Over time, the focus has shifted towards breaking barriers and fostering genuine inclusion in schools. This paradigm shift involves developing new understandings of disability and recognizing the diverse educational needs of all students. Inclusive education promotes diversity and active participation among all students within classrooms and the broader school community (Spandagou, 2020).

While the movement towards educational inclusion faces challenges, its importance cannot be understated. Creating an inclusive educational environment that values diversity and strives for equity remains a critical aspect of modern education. The ultimate goal of inclusive education is to promote equity and accessibility for all students, ensuring a thriving and supportive learning environment (Bešić, 2020; Ebersold, 2021).

Extensive research has indeed consistently shown that inclusive education benefits not only students with disabilities but all students in the classroom. Inclusive classrooms have demonstrated higher levels of academic achievement, improved self-esteem, and increased social integration (Dyson et al., 2002; Dyssegaard & Larsen, 2013; Hehir et al., 2016; Waldron & McLeskey, 2010). A meta-analysis conducted by Oh-Young and Filler (2015) provided compelling evidence supporting the positive impact of inclusive education on learners with disabilities. The findings indicate that students educated in more integrated settings outperformed those in less integrated settings, both academically and socially. This reinforces the notion that “separate is not always equal” (Oh-Young & Filler, 2015, p. 90). Furthermore, Krämer et al. (2021) conducted a comprehensive meta-analysis encompassing primary studies centered on inclusion, specifically targeting students with General Learning Difficulties (GLD). Notably, aside from demonstrating improved academic performance within inclusive school environments, students with GLD also experience heightened societal engagement (Farrell, 2000). This advantage is underscored by the absence of any negative impact on these students’ psychosocial well-being resulting from inclusive education practices.

Furthermore, research has examined the outcomes of inclusive education for students without disabilities as well (Szumski et al., 2017, 2022). As cited in Hehir et al.’s (2016) systematic review, a substantial body of evidence indicates that both students with and without disabilities develop stronger reading and mathematics skills, exhibit higher attendance rates, experience fewer behavioral issues, and are more likely to complete secondary education when included in inclusive classrooms.

In addition to the benefits for students, inclusive education also has a positive impact on teachers and school staff. Gray et al. (2020) found that inclusive environments enhance educators’ understanding of



diverse learning needs, contributing to their professional growth and ability to support all students effectively.

In summary, research highlights the substantial benefits of inclusive education, fostering academic and social growth for students with disabilities while enhancing the learning environment for all. Despite progress in diverse inclusion efforts, integrating SEN students, especially those with intellectual disabilities, remains a challenge (Amor et al., 2019). The literature identifies several interrelated factors in developing inclusive practice, including policies, financing, school organization and leadership, school climate, classroom practice, curriculum design, teacher training, and collaboration (Bešić, 2020; Filosofi et al., 2022; Kefallinou et al., 2020; Loreman et al., 2014). Below we focus on reviewing three crucial principles supporting successful inclusive implementation. This comprehensive framework serves as a guiding beacon for educational systems, steering their endeavors to enhance the educational journey of all students with special educational needs.

Towards Inclusive Environments in Education

Inclusion demands that no one should be discriminated against based on their recognized interindividual differences. The “Index for inclusion, Developing learning and Participation in Schools” by Booth and Ainscow (2002) serves as a valuable reference in this context. Indeed,

a school aiming to be accessible and equitable must clearly define its guiding principles and establish its own quality indicators (Mainardi, 2021). These principles should ensure that no one is discriminated against, either positively or negatively, based on their individual differences.

1. Preventing discriminatory situations and maintaining the highest quality of learning and teaching.

Do not discriminate negatively:

To avoid negative discrimination, it is essential to move beyond solely focusing on deficits or defects. Vygotsky, a pioneer in modern “defectology”, urged educators to view individuals holistically, recognizing the vast reservoir of resources present within each person; be it in their learning and developmental capacities or within their physical and social context. Vygotsky (1929) introduced the concept of *additional accumulation of difficulties*, urging us to differentiate between the primary effects of deficits on individuals and the secondary effects within a given situation.

This perspective gains further depth through the concept of *situational handicap* (Minaire, 1992; Mainardi, 2013) These term refer to the noticeable personal disadvantages that emerge within one or more situations, disadvantages that can be mitigated or averted through adjustments to the environment. Its significance is pivotal in ensuring optimal conditions for learning, daily life, and social engagement for all students within a school setting. It entails: (1) studying variables influencing potential challenges in learning situations, (2) developing strategies to prevent or address difficulties in diverse learning contexts, creating equitable accessibility for all learners while acknowledging heterogeneity.

Do not discriminate positively:

Academic performance isn't solely determined by expected competences; positive outcomes showcase competence, while negative outcomes reveal challenges within the given context. Embracing accessibility and recognizing potential barriers can mitigate disadvantages caused by personal and environmental factors.

In SEN contexts, evaluating various influencing factors and secondary effects is crucial. Compensatory measures might not fully address underlying disadvantages. Instead, equitable conditions should be established for each learner, focusing on leveling the playing field rather than favoring positive discrimination. Positive discrimination, or affirmative action, refers to policies and practices designed to address



and eliminate historical and structural inequalities affecting disadvantaged groups (Lippert-Rasmussen, 2020). However, such measures can sometimes create a perception of unfairness or stigma, suggesting that beneficiaries are less qualified or deserving. Therefore, it is more effective to create equitable conditions for all students by addressing primary and secondary effects that impact their educational experiences.

It is not the educational needs that produce disadvantages to be compensated for, but the conditions as such. Teachers should focus on individual needs and equal opportunities, avoiding the compensatory approach associated with positive discrimination. Understanding and addressing primary and secondary effects can foster an inclusive environment that supports diverse student needs, promoting equity and holistic growth.

2. Understanding and addressing situational discriminations and inclusion: an exploration of key variables.

In examining the experiences of individuals with disabilities or diagnosed neurodevelopmental disorders, several scientific perspectives guide and shape the necessary special attention to be given. One of these perspectives is the bio-medical approach, as defined by ICD-11 from the World Health Organization (World Health Organization). This perspective takes a curative medical approach, seeking to understand the disorder or deficit condition from a bio-medical standpoint and addressing it through appropriate interventions.

Another significant viewpoint is the normative-functional and compensatory approach, also defined by ICD-11 (World Health Organization). This perspective emphasizes functional rehabilitative models, prioritizing skill development and the utilization of aids and supports like prosthetics and orthopedic aids.

Additionally, the accessibilities perspective, as first described by Sanchez in 1992, is crucial. This perspective examines how the environment impacts individual users, aiming to adapt the pedagogical, educational, and organizational environment to minimize discrimination and enhance the experiences of all individuals, with a specific focus on the environment's role.

Lastly, the civic or human rights perspective, outlined by Fougeyrollas and Beauregard in 2001, plays a significant role in placing the issue in the ethical realm. This approach analyzes the management of heterogeneity and equal opportunity concerning the person's condition. It places strong emphasis on human rights and equity, functioning within the framework of inclusivity and equal opportunity.

It must be concluded that to ensure the preparation of equitable learning and teaching situations, a holistic approach is essential. This must lead to harnessing and developing multidimensional models focused on the conditions of a person's consideration, participation and functioning within a specific context. Understanding and analyzing the complexity of situations and contexts from all the previously mentioned perspectives-when they allow for the necessary reconsideration of contingent and causal factors for the accumulation of difficulties-are vital aspects of preparing truly accessible and inclusive environments.

3. Unraveling the Pedagogical Core of School Environments (OECD, 2014)

A school is made up of environments that characterize it and work together to determine it. The specifics of each school system can be observed through the analysis of the *Pedagogical core of (its) school environments* (OECD, 2014), that is, through the analysis of the characteristics of its constituent elements and their relationships. The pedagogical core, according to the considered model, includes:

- (a) *The Groupings of Learners* scrutinizes access parameters to the school and the structural facets of either amalgamation or differentiation among learners,



- (b) *The Groupings of Professionals* delves into the allocation of tasks and responsibilities, along with the symbiotic skills and cooperative interactions among educational professionals,
- (c) *The Planning of Learning Formats and Timetables* engages with pedagogical decisions, didactic strategies, and the intricacies of the study plan, all aimed at fostering efficacious learning encounters,
- (d) *The Pedagogies and the Practices of Evaluation* entail a grasp of the methods employed for tracking progress and the procedures for certification within the educational framework.

The intricate connections among these elements, along with their ties to practices and research, play a pivotal role in cultivating genuinely inclusive environments. A deep comprehension of the dynamics and interdependencies within the pedagogical core empowers the formulation and execution of strategies that champion inclusivity and cater to the diverse requirements of all learners. The subsequent sections provide a detailed review of these distinct points.

3.a. The Groupings of Learners: from Ghettoization to Inclusion

The evolution of formal educational grouping of learners can historically be understood through the identification of distinct steps and phases (Mainardi, 2023; Rodriguez & Garro-Gil, 2015). During the first phase, individuals were systematically marginalized (ghettoization) due to factors such as gender, ability, or cultural background (Anderson, 2006; Anyon, 1997; Mason, 1990). This resulted in a troubling disregard for the potential of all individuals and contributed to a stark disparity in the value placed on different people. As Hines and DeYoung suggested (2000), this inclination to categorize people, often with one's own group positioned as superior, led to the emergence of patterns reminiscent of ghettos. This distressing trend reached its peak under the Nazi regime.

When education becomes a universal right, "structural separation" based on individual characteristics such as age, gender, etc., or on sensory, intellectual, or motor traits in creating groupings of pupils and classes seems to be perceived as indispensable (Mickelson et al., 2008). It conveys the idea that homogenizing conditions for groups of learners promote education and learning (phase 2: the segregation / separate approach).

This standpoint does not make unanimity. During the 1970s, a shift occurred as some countries began to question the norm of segregation, favouring instead policies that leaned towards integration. This shift was informed by pivotal works and legal milestones, such as Nirje's seminal 1969 work, "The Principle of Normalization," and Italy's transformative Law 517/1977. This legislation, for the first time in Italy, mandated the integration of children and adolescents with disabilities into both elementary and middle schools. It expanded upon the earlier Law 118/1971, which marked a significant initial step towards inclusion by requiring compulsory education to take place in regular classes of public schools, except in cases of severe intellectual or physical impairments that would prevent or significantly hinder learning or integration. Article 28 of Law 118/1971 explicitly stated, 'compulsory education must take place in regular classes of public schools, except in cases where individuals are affected by severe intellectual deficiencies or physical impairments of such severity as to prevent or make it very difficult for them to learn or integrate into the aforementioned regular classes.' This set a foundational precedent that later allowed for more comprehensive inclusion policies, such as those introduced by Law 517/1977, which extended integration mandates to middle schools.

At this critical historical moment, the discourse in education was deeply influenced by two divergent and competing ideological stances. There was a growing advocacy for the specialization of educational practices and environments, leading to a culture that fervently supported specialized pedagogies and settings. Conversely, there was a burgeoning movement towards integration, promoting a culture where inclusivity and accessibility were paramount.

This evolution has seen the birth of specialized and special education frameworks, alongside the enhancement of mainstream settings to inclusively accommodate students with disabilities. This dichotomy has been the catalyst for innovative thinking and the inception of new initiatives. It has given rise to "hybrid" models that, while nominally separate, inherently tend toward the growth and evident practical



promotion of successful integration experiences that anticipate the shift to the integrative approach (phase 3). This approach was adopted in the 1970s as a concept, but, except for a few states such as Italy, tended to be – in practice – a negotiable exception (Franklin, 1996).

This gives way, first spottily and then wildly, to a growing number of new experiences within traditional school contexts. Gradually, outdated pedagogical beliefs were challenged by research, ethics, and legal principles.

In 1994, the concept of inclusion came to the forefront within the realm of special education, stemming from the outcomes of the Salamanca World Conference (Unesco, 1994). This marked the establishment of a fresh guiding principle (phase 4), reshaping the manner in which students were grouped within mainstream educational settings (Ainscow et al., 2019).

This phase signifies a transformation from negotiability to normativity, where accessibility has emerged as a pivotal gauge of educational excellence (Ebersold, 2021). This ongoing progression comprises two key steps (Mainardi, 2023): 1) the integration of the ethical imperative of accessibility takes center stage, as inclusion becomes a paramount objective for schools; 2) the alignment with the school's imperative of accessibility involves the establishment of genuinely inclusive and high-quality educational environments. This necessitates a comprehensive dissemination of effective pedagogical practices through research, culminating in a coherent and profound transformation of the pedagogical nucleus within novel educational setups.

It should be noted that pedagogical processes of accessibility differ substantially from the mere individualization or personalization of learning experiences at school. They require considering from the outset, not a posteriori, the characteristics of each pupil or student, taking classroom heterogeneity as assumed, and deeming it normal and qualitatively sensible for teaching and learning to implement and orchestrate classroom scenarios that are accessible to all and conducive to the acquisition of skills based not only on general curricula but also on individualized curricula and plans (Ainscow, 1991; Ebersold, 2021; Prudhomme et al., 2016). Rather than relying solely on compensatory methods of differences from a given norm, accessibility places emphasis on what in school environments can avoid senseless discrimination and unnecessary disadvantages in learning situations and school environments, particularly in group formation strategies, in teaching methodologies, in collaborations among different school actors, and in formative and certifying assessment strategies.

3.b. The Groupings of Professionals: from Task separateness to Task sharing

Teacher collaboration has shown significant positive impacts on learner achievement, teacher practices, and professional development, enhancing individual and collective feelings of competence and self-efficacy. Co-teaching is a crucial aspect of collaboration, where teachers work together not only during the teaching act but also during the design and planning stages (Ghedini & Aquario, 2016; Murphy, 2016). Flexible environments and school organizations that encourage collaboration, variation in groups and forms of activity, and teaching differentiation can promote innovation and shared teaching.

A study by Granger & Dumais (2016) on collaboration between mainstream and special teachers in inclusive classes revealed the importance of viewing all teachers as equally responsible for all pupils in the class, regardless of their specific professional profiles. By clarifying each teacher's role and providing co-teaching training, schools can achieve successful collaboration and co-teaching. This collaborative model allows teachers to benefit from their complementarities and make intentional choices regarding forms of collaboration, focusing on class activity beyond individual solutions for specific pupils (Granger & Dumais, 2016).

Engaging in transformative practices and adopting new approaches may be challenging but is essential for creating inclusive and effective learning environments.

In conclusion, embracing collaborative teaching and learning approaches, particularly through co-teaching and professional grouping, can lead to more inclusive and enriching educational experiences for all students. By fostering a culture of collaboration and providing necessary support, schools can create environments that benefit both teachers and learners and promote the success of inclusive education.



3.c. The Planning of Learning Formats and Timetables

Amidst the evolving landscape of inclusive education, the referenced approach becomes obsolete, particularly in compulsory schooling. An enlightening exploratory study conducted alongside the mentioned experimentation (Giovannini & Mainardi, 2019) has unveiled noteworthy insights from both “generalist” and “specialized” teachers. These insights center on assessing student progress, certifying skills, and the correlation between individual advancement and predefined standards during the assessment of individual learning journeys.

A telling incident exemplifies disparate initial viewpoints on progress standards during a budget meeting. A “specialized” teacher proudly highlights achievements of students with special educational needs (SEN). In contrast, a “generalist” colleague promptly points out that while progress is evident, these students are falling behind. The “generalist” teacher adheres to a normative paradigm where time is pivotal in skill qualification, contrasting with the potential for diverse and valid learning paths. These paths differentiate not only the educational approach but also the core curriculum content.

In this instance, the “mainstream” teacher’s concern is less about progress and skills and more about deviations from “normal and normative” timelines set by school curricula. Learning pace appears to outweigh content. Conversely, a “compensatory” perspective justifies assessing progress demonstrations despite deviations from norms. The child’s progress aligns with the pedagogical project and the intended continuum of competencies. The central query is whether this progress can be enhanced through contextual adjustments, irrespective of conventional learning rhythms (Mainardi, 2021).

In compulsory education, formative considerations must outweigh the timing of competency showcases. Otherwise, students might encounter advanced experiences without foundational skills for engaging with novelty. This is mitigated by tools like “individualized teaching plans” and “individualized educational projects,” preserving ambitious learning goals while freeing outcomes from predetermined learning tempos.

3.d. The Pedagogies and the Practices of Evaluation

Empirical evidence substantiates that effective pedagogical practices in an inclusive school align closely with the established practices beneficial for the majority of students, including those with SEN (Pelgrims et al., 2021). These practices represent an adaptation of the foundational pedagogical approach to the entire class, acting as a unified whole. The accessibility paradigm propels both “traditional” and “special” pedagogies to converge, creating a novel and comprehensive synthesis that transcends their conventional notions. This amalgamation results in the development of learning environments that we characterize as “neo usual” specifically tailored to inclusive education.

This shared understanding underscores the significance of inclusive practices intertwined with differentiated pedagogical strategies as a “distinctive and pervasive attribute,” rather than an “exceptional” trait limited to teaching involving students with SEN. This viewpoint profoundly impacts several aspects: firstly, it influences the learning activities, curricula, learning contexts, tasks, learning materials, assessment practices, and planning strategies; secondly, it synchronously shapes individual and collective experiences, the customization of support and expectations, and the meticulous observation and data collection essential for personalized formative assessment; and finally, it post hoc informs reflective practices aimed at integrating case-specific adjustments based on observed data, fostering continuous improvement in pedagogical designs of environments optimally aligned with student and environmental circumstances.

The assessment of learning intertwines with an evaluation aimed “for” the acquisition of skills and attitudes. Personalized assessment mandates the scrutiny of explicit and implicit factors that can influence performance, encompassing the sequence of competences inherent in task execution and the learner’s mastery of such competences: from comprehending instructions to skill demonstration techniques (Mainardi, 2013).



Conclusions

From a deontological standpoint, educational institutions bear the responsibility of ensuring quality education and equal access to mainstream schooling. The contemporary educational landscape emphasizes the accessibility of learning and life experiences within school environments. This convergence signifies a departure from the structural differentiation principle in basic education, where curricula and educational settings now harmonize objectives across disciplinary and transversal competences, while integrating all four constituent elements of the pedagogical core. This necessitates the presence of requisite competences within inclusive school environments to foster optimal learning conditions, social integration, positive self-perception, and mutual acceptance among classmates (Koster et al., 2009).

Scientific observations, as highlighted by Kielblock and Woodcock (2023), underscore the journey from embracing the inclusive ideal to embedding it genuinely within inclusive school contexts. Prevailing research often showcases a limited view of inclusion, with empirical studies on teacher attitudes primarily focusing on special education inclusion and its indicators linked to students with SEN (Ramberg, 2021). Furthermore, although numerous studies have engaged in comparing outcomes of pupils with SEN in mainstream and special educational settings, there is a noticeable dearth of research concerning the distinct attributes of these settings (for instance, Alonso-Campuzano et al., 2024; Klang et al., 2020, offer insights into studies concerning intellectual disability). This approach, whether implicit or explicit, tends to overlook broader school development and instead emphasizes the situating of SEN students within a given context.

To achieve truly inclusive school environments, we suggest the following approach:

1. Reassess outdated or skewed research frameworks that fail to recognize the inclusive school as an universal institution (Slee, 2013).
2. Avoid drifting towards choices that treat inclusion as an issue applicable only to specific students (Hardy & Woodcock, 2015).
3. Center research on the attitudes and practices conducive to quality education (Lindner et al., 2023; Scior et al., 2020).
4. Foster the exchange of empirical evidence: encourage projects and stimulate comparative studies exploring factors contributing to the quality and efficacy of increasingly accessible and beneficial school environments for all (Nilholm & Göransson, 2017; Schwab, 2020).
5. Shift from segregated to inclusive educational settings without inadvertently abrogating the rights of children with severe disabilities (Byrne, 2022) .

In the short term, schools and stakeholders should focus their attention on: (a) Cultivate or sustain open environments and scenarios optimizing the contributions of the school for all; (b) Reevaluate individual components of the pedagogical core within school environments, considering their interrelations and alignment with set objectives in light of expected evolution; (c) Rethink the concept of compensatory measures, as in contexts marked by heterogeneity, accessibility -particularly through Universal Design for Learning - precludes or minimizes the need for compensations in a regular context (Rusconi & Squillaci, 2023).

In this regard, it is vital that there is professional development for teachers regarding evidence-informed inclusive practices which would lead to successful teacher experiences (Sharma et al., 2021; Sharma & Sokal, 2015; Tristani & Bassett-Gunter, 2020; Van Mieghem et al., 2020).

In essence, the journey towards truly inclusive school environments hinges on a comprehensive shift in perspectives and practices, marked by a commitment to equal opportunities, holistic growth, and an unwavering dedication to fostering an inclusive learning ecosystem.



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