

# STUDIES DEVELOPED BASED ON THE “INDEX FOR INCLUSION” DOCUMENT<sup>1</sup>

## *ESTUDOS DESENVOLVIDOS TENDO COMO BASE O DOCUMENTO “INDEX PARA A INCLUSÃO”*

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**ABSTRACT:** Inclusion in Education as a new proposal of school culture aims at the development of a school “for all”. The implications of this legal process consist of the recognition of equal value and rights among human beings and the consequent decision-making by the school, with a view to developing inclusive cultures, policies and practices. One of the possibilities of carrying this task out is through the development of the Index for Inclusion. It is a guiding document of institutional processes of self-revision, particularly directed to schools of Basic Education, but quite adaptable to other educational contexts and even to other types of institution. Thus, the objective of this study was to carry out a theoretical review on the theoretical and methodological construction and the applicability of the document “Index for Inclusion”. Characterized as a narrative bibliographic study, data collection was carried out in national and international databases, such as Web of Science, Scopus, Parthenon, Capes and Dialnet, through the use of the following keywords: “Index for Inclusion” and “Booth”, with a temporary cutoff between the years 2011 and 2016, resulting in 17 papers. In addition to the dissemination of the use of the instrument, this study shows how the “Index for Inclusion” has been adapted and developed in the international and national educational context, enabling the Brazilian public network of schools to have greater autonomy when it comes to inclusive cultures, policies and practices.

**KEYWORDS:** Special Education. Inclusive Education. Index for Inclusion.

**RESUMO:** A Inclusão em Educação como uma nova proposta de cultura escolar visa o desenvolvimento de uma escola “para todos”. As implicações desse processo legal consistem no reconhecimento da igualdade de valor e de direitos entre seres humanos e na consequente tomada de decisões por parte da escola, com vistas ao desenvolvimento de culturas, políticas e práticas inclusivas. Uma das possibilidades de levar-se tal tarefa a cabo é por meio do desenvolvimento do Index para a Inclusão. Trata-se de um documento orientador de processos institucionais de autorrevisão, particularmente voltado a escolas de Educação Básica, mas bastante adaptável a outros contextos educacionais e mesmo a outros tipos de instituição. Assim sendo, este estudo teve como objetivo realizar uma revisão teórica sobre a construção teórico-metodológica e a aplicabilidade do documento “Index para a inclusão”. Caracterizada como um estudo bibliográfico narrativo, a coleta de dados foi realizada em bases de dados nacionais e internacionais, como a *Web of Science*, *Scopus*, *Parthenon*, *Capes* e *Dialnet*, a partir das seguintes palavras-chave: “Index para a Inclusão” e “Booth”, com recorte temporário entre os anos de 2011 e 2016, resultando em 17 artigos. Para além da divulgação do uso do instrumento, este estudo mostra como o “Index para a Inclusão” tem sido adaptado e desenvolvido no contexto educacional internacional e nacional, possibilitando à rede pública de escolas brasileiras mais autonomia no que se refere às culturas, às políticas e às práticas inclusivas.

**PALAVRAS-CHAVE:** Educação Especial. Educação Inclusiva. Index para a Inclusão.

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## 1 INTRODUCTION

Inclusion in Education as a new proposal for school culture aims at the development of a school “for all” (United Nations Educational, Scientific and Cultural Organization [UNESCO], 1990), one of the major challenges in the educational scenario. A school for all is a school in movement that seeks to transform and overcome inequalities among its peers and promote the development of cultures, policies and practices of citizenship, the exercise of human rights, democracy, respect, among others. It is the ability of a school unit to engage in the innovative generation of a heterogeneous posture, rather than the old but still prominent culture of homogenization of our schools.

Therefore, it is necessary a theoretical and practical contribution, from which a series of relationships must be redefined, that is, it is necessary to break the practice that prioritizes the quantity instead of a quality work, so that a democratic education, whose relations are equal or less unequal, and the rights of all, guaranteed with equality, is achieved (Santos, 2003). One of the possibilities of carrying out such a task is through the development of the Index for Inclusion (Booth & Ainscow, 2012a) in school institutional contexts. This material has existed since the year 2000 and has been updated frequently by its main author (Tony Booth), being, today, in its fourth edition. Of simple use and provocative nature, it has already been translated into 40 languages, in several countries. Used in research and initiatives for continuing education in schools, the Index has proved to be a useful tool to promote the rethinking and re-signification of cultures, policies and practices of inclusion in education, which can be verified, also, in the page of the Index for Inclusion Network<sup>6</sup>.

In view of the growing awareness of this material, as well as the fact that its usefulness in the field of Special Education for the development of schools in an inclusion perspective, as some of the studies researched in the present investigation will confirm, this paper aims to carry out a theoretical narrative revision on the theoretical-methodological construction and the potential development of the Index for Inclusion document.

Showing the complexity of a theoretical and methodological construction of a phenomenon is not an easy task, however it is necessary, so that it can carry out interlocutions with other studies, seeking out the singularities that involve such phenomenon. Likewise, it is important to seek a methodology for constructing the phenomenon, in this case, the Index for Inclusion, to attest its scientific nature, with the purpose of helping to expand new proposals for study and more appropriate interventions, aiming at inclusive education.

## 2 THE DEVELOPMENT OF THE “INDEX FOR INCLUSION”

The “Index for Inclusion: developing learning and participation in schools”, “is a resource to support the inclusive development of schools. It is a comprehensive document that can help everyone to find their own next steps in developing their setting” (Booth & Ainscow, 2012a, p. 6). The Index was conceived in 1998 as part of a research project entitled *Developing sustainable Education Inclusion policy and practice: England, South Africa, India and Brazil*, which is internationally known as *The 4 Nations Project*, financed by UNESCO and coordinated by professors Tony Booth and Mel Ainscow.

<sup>6</sup> Retrieved from <http://www.indexforinclusion.org/>

In Brazil, the study was coordinated by Professor Mônica Pereira dos Santos from the Federal University of Rio de Janeiro (UFRJ), who has been developing it in different educational institutions. The author points out that Professors Booth and Ainscow launched the first version of the Index in 2000, translated into Portuguese in 2002 by Professor Mônica Pereira dos Santos, whose Laboratory of Research, Studies and Support to Participation and Diversity in Education (LaPEADE<sup>7</sup>), at UFRJ, has been, since then, encouraging the use of the Index in Brazil (Santos, 2009).

In order to enrich and guarantee more reliability and validity to the first version, the authors/professors invited the rest of the countries members of the Project 4 Nations to apply the resource in their schools, obtaining as an experience new delineations and enabling this way the second version of the Index, which was published in 2002 in England and translated for Brazil in 2006.

At the present time, the “Index for Inclusion” is in its fourth version, launched in England in 2015 and currently being translated for Brazil. In the third edition, significantly modified by Tony Booth, the resource responds and contemplates numerous contributions and detailed reflections done by other countries (Santos, 2015).

In Brazil, the “Index for Inclusion” has been implemented for more than a decade, in association with international research groups, which invest in scientific productions related to the resource, proving its effectiveness in different Brazilian realities. Being a proposal whose structural flexibility allows adaptation to a diversity of contexts, the Index generates a transforming cultural, political and institutional construction towards educational inclusion.

With this characteristic, the use of the Index allows a detailed review process of the school and its relationship with the community and its surroundings, including teachers, employees, managers, parents/guardians and children, aspirations for institutional development oriented by inclusion with what is already known by the school and impelling to a more accurate investigative procedure. It is based on the principles of “barriers to learning and participation, resources to support learning and participation and support for diversity” (Booth & Ainscow, 2012a, p. 13). The Index proposes the understanding of institutional processes from three dimensions: cultural, political and practical. Each dimension is divided into two sections or axes, forming a planning structure. The planning topics in each section help ensure that the actions support each other, as shown in Table 1.

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Dimension A	Creating inclusive cultures	A1 – Building Community
		A2 – Establishing inclusive values
Dimension B	Producing inclusive policies	B1 – Developing the School for All
		B2 – Organising support for diversity
Dimension C	Evolving inclusive practices	C1 – Orchestrating learning
		C2 – Mobilising resources

**Table 1.** Dimensions of “Index for Inclusion”

Source: Booth and Ainscow (2012a, p. 13).

Therefore, the implications of this legal process are the recognition of equal value (Booth, 1981) and of rights between human beings and the consequent attitudes and decisions made by the school, aiming at the development of cultures, policies and inclusive practices. In this sense, we agree with the definition of “inclusive culture” as being

creating secure, accepting, collaborating, stimulating, welcoming communities, in which everyone is valued. Shared inclusive values are developed and conveyed to all staff, children and their families, governors, surrounding communities and all others who work in and with the school. The values of inclusive cultures guide decisions about policies and moment-to-moment practice, so that development is coherent and continuous. The embedding of change within school cultures ensures that it is integrated into the identities of adults and children and is passed on to new arrivals to the school (Booth & Ainscow, 2012a, p. 46).

“Inclusive policies” seek to ensure that:

inclusion permeates all plans for the school and involves everyone. Policies encourage the participation of children and staff from the moment they join the school. They encourage the school to reach out to all children in the locality and minimise exclusionary pressures. Support policies involve all activities which increase the capacity of a setting to respond to the diversity of those involved in it, in ways that value everyone equally. All forms of support are connected within a single framework aimed at ensuring everyone’s participation and the development of the school as a whole (Booth & Ainscow, 2012a, p. 46).

As for “inclusive practices”, they refer to the development of what it is, how to teach and learn, in order to reflect on inclusive values and policies. In this sense, inclusive practices link

learning to experience, locally and globally, to rights and environmental sustainability. Learning is orchestrated so that teaching and learning activities are made responsive to the diversity of young people within the school. Children are encouraged to be active, reflective, critical learners and are viewed as a resource for each other’s learning. Adults work together so that they all take responsibility for the learning of all children (Booth & Ainscow, 2012a, p. 46).

A relevant focus on the inclusion concept of the Index concerns the implications of principles and values, which should be rooted in people, so that they can be agreed, not as a fad or a rule to be followed but, rather, in understanding the importance of promoting, through actions and understanding of the actions of others, the development of inclusion overcoming exclusion.

Equality, rights, participation, respect for diversity, community, sustainability, nonviolence, trust, honesty, courage, joy, compassion, love, hope/optimism and beauty stand out among the values that support an inclusive practice proposed in the Index. Among these, five are highlighted as core: participation, equality, community, respect for diversity and sustainability (Booth & Ainscow, 2012a). The Index in the 2012 version defines these five values as can be seen in Table 2.

Participation	“Participation increases when engagement reinforces a sense of identity; when we are accepted and valued by ourselves” (p. 23).
Equality	“Equality does not mean that everyone is equal or treated in the same way, but that everyone is treated as being of equal value” (p. 22).
Community	“Inclusive communities are always open to new members who contribute to their transformation and are enriched by them” (p. 23).
Respect for diversity	“Inclusive respect involves valuing others and treating them well (...). ‘Diversity’ includes differences and similarities perceived and unperceived among people: diversity concerns the difference within ordinary humanity” (p. 23).
Sustainability	“Environmental sustainability is central to inclusion at a time when environmental degradation, deforestation and global warming threaten the quality of life for all” (p. 24).

**Table 2.** Main values in inclusive educational development according to the Index.

Source: Booth and Ainscow (2012a, p. 22-24).

Values constitute a direction in which all those involved in the school process must understand their relation with their actions, in a constant process to develop coexistence and education with each other. The authors emphasize that in order to ensure inclusion in schools, so that there is learning and participation of all students, it is important that inclusive practices reflect the culture and inclusion policies adopted by the school institution, ensuring that students’ prior knowledge is valued in classroom activities, providing the participation of everyone. “Teaching and support are integrated in the orchestration of learning and overcoming barriers to learning and participation” (Booth & Ainscow, 2006, p. 45).

Nevertheless, there are barriers that impede the consolidation of school inclusion. Some, quite significant, have been exhaustively pointed out in scientific literature, which reveal as main cause the unprepared teachers, the excessive number of students in the classrooms, the precarious or non-existent physical accessibility of schools, curricular rigidity and unsuccessful practices of assessment (Glat & Nogueira, 2002; Rodrigues, 2006; Martínez, 2010).

Capellini (2004), in a study involving 423 teachers, found out that the three main factors that hindered the school inclusion process were related to the school (excessive number of students and lack of technical staff), the teacher and the family. It is also worth noting that, despite the difficulties mentioned above, some collaborative researches related to the school team demonstrate advances in the educational practice regarding attention to diversity, considering the singularities of the students (Capellini, 2004; Mendes, Marques, & Lourenço, 2012).

In this sense, it is observed that several international studies (Booth, 2011; Cansino, 2010; Moliner, Sales, Ferrández, & Traver, 2011; Salceda Mesa & Ibanez Garcia, 2015) as well

as Brazilians (Lago, 2014; Fernandes, 2014; Santos, Santiago, & Melo, 2015; Araujo, 2013; Silva, 2012) already use the “Index for Inclusion” in continuing education programs. The results of these studies point out that the document can be a way of strengthening reflections in everyday school life on inclusive cultures, practices and policies.

Thus, it is important to investigate and know the theoretical contribution of the “Index for Inclusion” document, which is an important investigation instrument through a process of reflection and action in schools, orienting them towards the development of their cultures, policies and inclusion practices (Santos, Nascimento, Motta, & Carneiro, 2014). This is what we will see later on.

### 3 METHODOLOGY

Characterized as a narrative bibliographic study, the data collection was done in national electronic databases (Coordination for the Improvement of Higher Education Personnel [CAPES] and LaPEADE) and international, namely: Web of Science, Scopus, Parthenon and Dialnet. For all of them, we used the keywords: Index for Inclusion, Booth, and we made the temporary cutoff between the years 2011 and 2016. From the international databases, we observed 12 papers, which were organized in tables for better visualization of the data. In the national databases, we observed a total of 36 papers, 31 of which originated in LaPEADE. They were then classified by thematic areas.

As for the five national and 12 international papers, we opted for an individualized description of each one. We did this in order to understand the different understandings and views of Index usage. Our main focus was not on the papers produced by the LaPEADE researchers, because they all follow the same theoretical-practical approach to the Index, and because they are more traditionally known in Brazil. Thus, they were put to the readers’ knowledge, but we chose to focus, in this paper, on the less known ones, which were five, making a total of 17 individually described papers.

### 4 INTERNATIONAL RESEARCH DEVELOPED ON THE BASIS OF THE “INDEX FOR INCLUSION” DOCUMENT

The “Index for Inclusion” is a resource widely used as theoretical methodological support in several studies, both national and international. Among the international ones, we found 12 studies that address the use of the “Index for Inclusion”, three of which are from 2011, one from 2012, two from 2013, three from 2014 and three from 2015, presented below.

Moliner et al. (2011) investigated the indicators related to Inclusive Education with teachers of regular and specialized education in Spain, using for this purpose a questionnaire of the Index for Inclusion, translated from English into Spanish (Booth & Ainscow, 2012b), which was adapted and divided into three scales, constituted of 63 items in total, with alternatives of Likert type responses on inclusive cultures, organization in the context of teaching-learning and inclusive practices. The results pointed out that there were no significant differences in the items related to cultures and organization, and only found significant differences in 12 of the 36 items, specific to the scale of inclusive practices, demonstrating that teachers are more aware and willing to use pedagogical strategies of a more inclusive nature.

Based on a request from the Ministry of Education, whose objective was to strengthen institutional capacity to deal with diversity, with a view to the inclusion process in Caldas, Colombia, Rendón (2011) carried out a research based on the “Index for Inclusion”, aiming at a self-evaluation of institutions, with the purpose of supporting educational institutions in the process of transforming more inclusive schools, in the dimensions of practices, policies and cultures of inclusion. As results, qualitative reflections of the partner groups emerged, looking at a historical panorama of the integration processes and the proposal of Inclusive Education. Changes occurred in the school culture with regard to the perceptions about daily life in the school, in the teachers’ performance and in the pedagogical processes, as well as the retrieval of the collaborative work.

In order to provide an overview of how school communities can work with a more inclusive approach to education, Carrington, Bourke and Dharan (2012) used the “Index for Inclusion” as a resource in a project developed in Australia and New Zealand, in order to support the education team in evaluation processes, as well as to increase participation and learning for all students. They concluded the study by highlighting some points of discussion to challenge and inspire school staff to work towards a more just society through changes in the school context. These points are related to the development of teachers in service, provoking a reflection and discussion about inclusion, as well as its wide use in school contexts with teachers, students, principals and parents.

Pérez (2013) analyzed the importance of the values of inclusion and multiculturalism in future education professionals, following the guidelines of the “Index for Inclusion” with a sample composed of High School, undergraduate and postgraduate students of the Tenerife University of Canary Islands. The results revealed the urgency of promoting intercultural education in order to bring about changes in beliefs, attitudes and behaviors in the face of cultural diversity, breaking the barriers that do not allow professionals to develop collaborative skills and strategies in relation to Inclusive Education.

Pacheco, López and Pacheco (2013) carried out a study in the province of Córdoba (Spain) to analyze the educational inclusion of 41 schools. To this end, they used the Spanish version of the “Index for Inclusion” (Booth & Ainscow, 2012b), as well as different complementary indicators of effectiveness, organization and functioning. When analyzing the data of the dimensions of the “Index for Inclusion”, the authors pointed out that the average percentages of all dimensions and subdimensions scored high (7.9%), indicating a high tendency of inclusion in the evaluated educational centers.

Alborno and Gaad (2014) provide us with a rich and contextualized picture of the implementation of the “Index for Inclusion”, in which the results are presented in the dimensions of cultures, policies and practices. Emerging themes include barriers to participation and learning, such as: lack of effective training, inadequate support services, including classroom structure. It also includes the positive aspects, such as the characteristics of the school’s welcoming system, support between school staff and community involvement. This study also provides ideas on the possible challenges for the implementation of the Index in the schools of United Arab Emirates (Dubai).

Figueroa and Muñoz (2014) analyzed the educational evaluation process carried out by an educational institution in Santiago, Chile, based on the “Index for Inclusion”. The

main conclusions are related to the enrichment of the process of self-evaluation and the use of the document, which provides, according to the participants, a reflective and transformative vision, guiding the search for resources and barriers to inclusion. In this sense, participation is crucial in this process, becoming a bridge to achieve local empowerment and thus guiding the institution's path towards a more open and inclusive school culture.

Sarrionandia and Mateu (2014), in a study in Spain, offer some reflections on two important concepts for the creation of a social project with equity: Inclusive Education and sustainable development, since without the guarantee of sustainability, Inclusive Education, as any other principle or value, has no meaning. They emphasized that a set of values that favors the construction of Inclusive Education in the form of practices, cultures and political education occurs when one of these values is sustainability.

Salceda Mesa and Ibanez García (2015) adapted the document "Index for Inclusion" with the intention of using it in the university context, in order to evaluate cultures, policies and practices of educational institutions, as well as to implement inclusive actions in each one of these areas, from innovation to educational transformation. The authors pointed out that there are not many studies in this area in Spain and that, in general, local universities have an inflexible organization that hinders the development of alternative practices.

McMaster (2015) used the "Index for Inclusion" structure in a New Zealand school, noting that the Index is a flexible and appropriate tool for achieving sustainable school development and professional learning. The author concluded that an education system that allows individual expressions of culture and school leadership favors factors that influence the development of inclusion, such as the need for renegotiation of meanings, and that inclusion should be developed within a school culture through reflection on core values along with the alignment of these values with pedagogical practices.

In view of the above, it is observed that most of the international studies that used the "Index for Inclusion" in the investigations are from Spain. These studies indicate a high tendency in the inclusive process in schools, showing that teachers are more willing to use more inclusive pedagogical strategies. However, studies also point out that, in general, local universities have an inflexible organization, which makes it difficult to develop more inclusive practices.

This collection of international studies makes it clear that pursuing strategies that favor a mapping of inclusive practices and cultures is the way to promote changes in beliefs, attitudes and behaviors in the face of the inclusive process, enabling education professionals to innovate and transform the educational processes.

## **5 NATIONAL RESEARCH DEVELOPED ON THE BASIS OF THE "INDEX FOR INCLUSION" DOCUMENT**

In Brazil, the studies with the document "Index for Inclusion" began with the researchers of the Laboratory of Research, Study and Support to Participation and Diversity in Education (LaPEADE). Between 2011 and 2015, five Master's thesis and four Doctoral dissertations theses were developed, as well as 32 papers that deal with the topic of school



inclusion using the “Index for Inclusion” document. In this study, due to the limited space available, we chose to show the papers only, and not the theses and dissertations.

From the consultation and the reading of the papers available on the Laboratory website, a selection was made of those that had as a theoretical or methodological basis the “Index for Inclusion” as an instrument, which were categorized by themes according to the contents presented in each of the studies. Thus, the thematics were: 1) Continuing Education, with 13 studies; 2) Elementary School, with six studies; 3) Secondary education, with two studies; 4) Higher Education, with one study; 5) Theoretical study, with six studies; 6) Teaching practice, with one study; and 7) General Studies, with three studies, as can be seen in Table 3 below.

THEMATIC		TITLE	AUTHORS
Continuing Education (13)	1	Planejamento de estratégias para o processo de Inclusão: desafios em questão (Planning Strategies for Inclusion in Education: challenges for discussion)	Santiago & Santos (2015) Paper published in journal
	2	Formação de professores para o atendimento educacional especializado: políticas e práticas instituintes de inclusão (Teacher education for specialized educational service: instituting policies and practices of inclusion)	Santos, Santiago, & Melo (2015) Paper published in journal
	3	As contribuições da mediação professor e aluno e a importância do lúdico no ensino da matemática nos anos iniciais do Ensino Fundamental (The contributions of the teacher and student mediation and the importance of the playfulness in the teaching of Mathematics in the initial years of Elementary Education)	Venturini & Guimarães (2014) Paper published in journal
	4	Ciclo de formação de professores sobre Inclusão em Educação: em direção a uma perspectiva omnilética (Teacher education cycle on Inclusion in Education: towards an omniletic perspective)	Santiago (2013) Publication in annals
	5	A reflexividade dos formadores de professores diante das políticas de inclusão de universidades públicas (Reflexivity of teacher trainers in the face of the inclusion policies of public universities)	Santos, Araujo, Senna, Fonseca, & Santos (2013) Publication in annals
	6	O processo de Inclusão no Ensino Médio: o protagonismo dos alunos em foco (The process of Inclusion in High School: the protagonism of the students in focus)	Lago & Santiago (2013) Publication in annals
	7	Concepções de docentes e licenciandos de Educação Física acerca de inclusão em educação: perspectiva omnilética em discussão (Conceptions of teachers and teaching undergraduate students of Physical Education about inclusion in education: omniletic perspective in discussion)	Santos & Fonseca (2013) Paper published in journal
	8	Formação de professores e organização do Ensino nas Salas de Recursos Multifuncionais e classes comuns (Teacher education and teaching organization in Multifunctional Resource Rooms and common classes)	Kelman, Venturini, Santos, Morais, & Rodrigues (2013) Publication in annals
	9	Inclusão no Sistema Educacional: desafios para a gestão escolar (Inclusion in the Educational System: challenges for school management)	Santiago, Costa, Galvão, & Santos (2013) Publication in annals

THEMATIC		TITLE	AUTHORS
	10	O papel da Escola de Contas e Gestão do Tribunal de Contas do Estado do Rio de Janeiro na promoção de culturas inclusivas na gestão municipal Paula Alexandra Canas de Paiva Nazareth (The role of the School of Accounts and Management of the Court of Accounts of the State of Rio de Janeiro in promoting inclusive cultures in municipal management Paula Alexandra Canas de Paiva Nazareth)	Nazareth & Melo (2012) Publication in annals
	11	Políticas de inclusão e demandas de formação continuada na percepção de educadores de quatro municípios do Rio de Janeiro (Inclusion policies and demands for continuing education in the perception of educators from four municipalities of Rio de Janeiro)	Santos (2012a) Publication in annals
	12	Inclusão em Educação: desafios da formação docente (Inclusion in Education: challenges of teacher education)	Lago & Santos (2011) Publication in annals
	13	Do desejável e do real: culturas de inclusão ou de exclusão na formação de futuros professores de educação física? (Desirable and real: cultures of inclusion and exclusion in the training of future teachers of physical education?)	Santos & Fonseca (2011a) Paper published in journal
Elementary School (6)	1	A abordagem de pesquisa etnográfica nos estudos sobre educação (The ethnographic research approach in education studies)	Melo (2015) Book chapter
	2	“Não, isso não é coisa pra homem” - masculinidades e os processos de inclusão/exclusão em uma Escola da Baixada Fluminense (No, this is not a man thing - masculinity and the processes of inclusion/exclusion in a school in the Baixada Fluminense – RJ)	Brito, Freitas, & Santos (2014) Paper published in journal
	3	Masculinidades na Educação Física escolar: um estudo sobre os processos de inclusão/exclusão (Masculinities in School Physical Education: a study on the processes of inclusion / exclusion)	Brito & Santos (2013) Paper published in journal
	4	O currículo como dispositivo de promoção da Inclusão: relato de um estudo de caso (Curriculum as a device to promote Inclusion: report of a case study)	Carneiro, Santos, & Santos (2012) Text available on LaPEADE website
	5	O direito de aprender e participar do discente com dislexia (The right to learn and participate of the student with dyslexia)	Venturini (2012) Book chapter
	6	Barreiras de aprendizagem no Ensino Fundamental: o papel dos Laboratórios de Aprendizagem (Learning barriers in Elementary Education: the role of Learning Laboratories)	Santiago & Santos (2012) Publication in annals

THEMATIC		TITLE	AUTHORS
High School (2)	1	Promovendo a Inclusão em Educação através da participação: trajetória de uma pesquisa-ação no ensino médio (Promoting Inclusion in Education through participation: trajectory of an action research in High School)	Santos, Lago, & Hallak (2011) Publication in annals
	2	A participação como processo de Inclusão no Ensino Médio: trajetória de uma pesquisa-ação (Participation as a process of Inclusion in High School: trajectory of an action research)	Santos et al. (2011) Text available on LaPEADE website
Higher Education (1)	1	Concepções sobre Inclusão e Exclusão: licenciandos de educação física em foco (Conceptions on Inclusion and Exclusion: physical education teaching undergraduate students in focus)	Fonseca, Santos, & Venturini (2011) Publication in annals
Theoretical Studies (6)	1	Homofobia mata: do desconhecimento à cumplicidade (Homophobia kills: from unfamiliarity to complicity)	Marques & Oliveira (2015) Text available on LaPEADE website
	2	Construindo culturas, políticas e práticas de Inclusão em uma Escola Pública (Building cultures, policies, and practices for inclusion in a public school)	Pinto, Filgueiras, & Santiago (2015) Text available on LaPEADE website
	3	O Index para a Inclusão como instrumento de pesquisa: uma análise crítica (Index for inclusion as a research tool: a critical analysis)	Santos, Nascimento, Motta, & Carneiro (2014) Paper published in journal
	4	Políticas públicas de Inclusão de pessoas com deficiência: uma análise omniletica (Public policies of Inclusion of people with disabilities: an omniletic analysis)	Santos (2012b) Book chapter presented in an Encounter
	5	O mal-estar dos profissionais da Educação – culturas, políticas e práticas em um novo contexto (The malaise of education professionals - cultures, policies and practices in a new context)	Maças (2012) Text available on LaPEADE website
	6	Culturas, políticas e práticas de Inclusão na formação de professores em Educação Física: analisando as ementas (Cultures, policies and practices for Inclusion in teacher education in Physical Education: analyzing the menus)	Fonseca & Santos (2011b) Paper published in journal
Teaching Practice (1)	1	A complexidade da Inclusão no Atendimento Educacional Especializado (The complexity of Inclusion in Specialized Educational Service)	Rocha (2015) Publication in annals.

THEMATIC		TITLE	AUTHORS
General Studies (2)	1	L'impact des Politiques Néolibérales sur L'éducation: tensions entre prise en compte des diversités et standardisation (The impact of neoliberal politics on education: tensions between the consideration of diversities and standardization)	Akkari & Santiago (2012) Paper published in an international journal
	2	Direitos Humanos e Estatuto da Criança e do Adolescente: estudo de caso em uma ONG no Rio de Janeiro/BR (Human Rights and the Statute of the Child and the Adolescent: a case study in an NGO in Rio de Janeiro/BR)	Santos et al. (2012) Text available on LaPEADE website
	3	Do local ao global: encurtando as distâncias entre pesquisadores-reflexões sobre uma experiência de pesquisa em rede (From local to global: shortening distances between researchers-reflections on a networked research experience)	Maçãs & Senna (2011) Text available on LaPEADE website

**Table 3.** National papers that have as theoretical or methodological basis the “Index for Inclusion”.

Source: Authors' elaboration based on the results of the search in LaPEADE

As it can be seen in Table 3, most of the studies were published in annals of scientific events (12), followed by publications in journals (10), on the LaPEADE website, with a total of 7 studies and 3 book chapters. Most studies are related to continuing education, demonstrating the need to invest in in-service training, qualifying the school team for an education that is democratic and inclusive.

In addition to the studies of this group of researchers, five national studies, not produced in LaPEADE, were found in the CAPES database, two from 2011, two from 2014 and one from 2015.

Oliva (2011), in order to understand the school daily life of a student with visual impairment (VI) attending the regular class, as well as prejudices and attitudes towards him within the school, carried out the data collection from seven elaborated instruments, based on information of the “Index for Inclusion” and composed by questionnaires addressed to the teachers/school staff and students, as well as observation scripts and scale of proximity among the students. The data showed that the interaction with classmates is satisfactory, although more effective in the break time than in the classroom. The absence of curricular adaptations for accessibility resulted in the exclusion of content, in which his learning was partially neglected, with marginalization occurring in the classroom, creating in this way barriers to the incorporation of culture. The author emphasizes that the school focuses on the performance of normovisual students and a competitive and pragmatic search for results.

Crochik et al. (2011) sought to verify the validity of the content and reliability of the form for the characterization of inclusive schools, an instrument created based on the “Index for Inclusion”, applied in six public and private schools in the city of São Paulo. At the end,

the amplitude of the differences in the results obtained by the schools was observed, revealing their discriminative power.

Senna and Motta (2014), presented data from one of the research stages: The Update Cycle of Inclusion in Education for Teachers of the Multifunctional Resource Rooms (MRRs), with the purpose of presenting this training experience and discussing the cultures, policies and practices present in the MRR teachers' statements, as from the "Index for Inclusion". Regarding the dimension of inclusion cultures, a more attentive look was taken at the differences and potentialities of the Specialized Educational Services' students, with the intention of considering the students of the whole school and not only those of the teacher of MRRs. With regard to the dimension of the policies, they identified a movement of planning and search of evaluation strategies that perceived the process, the advances and the regresses of the student, in view of the objectives previously established. Regarding the dimension of the practices, the teachers pointed out some difficulties: they believe in a way to evaluate, they adopt an evaluation planning, but they cannot put this evaluation into practice.

Gomes (2014) aimed at understanding how the inclusion of students with intellectual disabilities and global developmental disorders in the regular schools of the city of São Bernardo do Campo, São Paulo, Brazil, has been carried out, and how this inclusion has implicated and committed the teacher in the construction of new teaching practices in the perspective of attending all students in the regular classroom. The research was carried out with teachers of Early Childhood Education and initial grades of Elementary Education and their respective Special Education teachers in five schools of the public network, having as theoretical reference the "Index for Inclusion". The results indicated that these teachers have sought information about the difficulties of the students included in a more autonomous way, as well as having sought the partnership with the Special Education teacher, who has contributed with the reflection and transformation of the practice of the teacher of the regular classroom for the benefit of all students. However, these actions are marked by individual rather than school-wide initiatives, distancing themselves from the construction of an institutionally recognized culture of inclusion, indicating the need for continuing teacher education.

Santos's study (2015) aimed at discussing the contributions of the "Index for Inclusion", with the intention to underpin a continuous or initial education based on questions and reflections about the processes of school exclusion. For that, the author presented the characteristics of the Index, as well as recent research data coordinated by his team in different contexts. Sequentially, she discussed the impacts and, lastly, argued that the Index is an extremely rich resource not only for schools, but also adaptable to any institution that wishes to revise its cultures, policies and practices of exclusion, in order to combat them towards inclusion.

It is important to emphasize that the Brazilian studies differ in their results in relation to the international ones. National studies are more focused on teachers' pedagogical practice, indicating the need for continuing teacher education to work with the students' diversity in a more inclusive culture.

## 6 FINAL CONSIDERATIONS

This study aimed to carry out a theoretical narrative review on the theoretical-methodological construction and the applicability of the “Index for inclusion” document. The importance of this document as an investigative tool through a process of reflection and action in schools, orienting them towards the development of more effective inclusion practices, is well-known.

However, in addition to the dissemination of the use of the resource, this study shows how the “Index for Inclusion” has been adapted and developed in Brazilian and international educational contexts, making schools more autonomous in terms of cultures, policies and inclusive practices.

As for its applicability, there may be some limitations, such as the difficulty of the school team to understand its objectives or even in relation to researchers who, for lack of knowledge, can use it without the appropriate adaptations according to the social and cultural context to which the study is inserted. However, we believe that the results of this study can contribute not only to the practical-pedagogical development in the school context, but also to researchers in the development of studies and interventions on inclusion practices and in the improvement of public policies in education, especially in Special Education in the perspective of inclusion.

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