

**Inclusive Education a Decade after Democratisation:  
The Educational Needs of Children with  
Disabilities in KwaZulu-Natal**

**Marguerite Maher**

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Primary Supervisor: Colin Gibbs

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## ATTESTATION OF AUTHORSHIP

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I hereby declare that this submission is my own work and that, to the best of my knowledge and belief, it contains no material previously published or written by another person (except where explicitly defined in the acknowledgements), nor material which to a substantial extent has been submitted for the award of any other degree or diploma of a university or other institution of higher learning.

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Marguerite Maher

## DEDICATION

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This thesis is dedicated to Connor Michael Lessing Munro. Connor, the youngest member of my whanau at that stage, died at age 19 months during the time this thesis was being written. This event reaffirmed for all within our whanau that we must live each day to the fullest – days that Connor will not have but which we have been gifted. Commitment to this resolution played a large part in my motivation to persevere and to complete this work. I thank him for that inspiration and dedicate this thesis to his memory.

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## PRELUDE

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Behind research is the person of the researcher and I respect the fact that I have been privileged to work with the participants in this study. I am grateful for their acceptance and support in this endeavour as I sketch the foundation of the relationships we have forged from past to present and into the future.

I was born and grew up in South Africa and lived there for 40 years. I attended a White school but my family was made up of great thinkers, motivated by the imperatives inherent in social justice, ensuring my education went beyond the confines of the classroom. My first degree was through medium of English at the University of Natal (now University of KwaZulu-Natal), my Graduate Diploma in Secondary Teaching was undertaken through medium of Afrikaans at the Randse Afrikaanse Universiteit. I completed my Masters degree through Massey University in New Zealand.

My own upbringing in South Africa means that I have the languages of three other cultural groups. I am nearly as fluent in Afrikaans as I am in English and have sufficient isiZulu that I can hold a conversation. I have the lived experience of culture. I have seen firsthand the realities of colour. This has made me who I am as a person. These are my roots. My affinity with the people is very deep. This links me to the land, to the people, to the topic of this thesis. It gives me authenticity with the people of this study.

Having been a teacher for some 20 years in KwaZulu-Natal, I had established relationships with some key people there. For example, in 1990 I was the deputy principal of a secondary school that had been Whites only under apartheid. With the release of Mandela came racial integration in schools. I played a key role in ensuring that the enrolment of our first Zulu students was a safe and positive experience for them. Students were provided with one person who would be their first port of call if they experienced any form of racial discrimination from teachers or other students. The person the leaders in the community chose was me, which was unusual because the Zulu culture is patriarchal, yet they chose a woman for this role. Relationships built have been pivotal to gaining entry to the field. When embarking on this PhD, I

approached these people with two potential topics. They rejected one and were very keen that I should undertake this study. I believe that this has given them a sense of ownership right from the outset which has been a tremendously important aspect to me. In its small way, this research aims to advance the interests of children with disabilities and their families.

## ABSTRACT

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Commitment to a single, inclusive education system has been the aspiration of reform in education in a democratic South Africa. The dilemma facing the democratically elected government was to write educational policy which, when translated into practice, would improve the educational standards offered to students in impoverished schools while at the same time allow the maintenance of the high standards achieved in schools which had been privileged under the apartheid system. There was, furthermore, the challenge of providing a curriculum that would be meaningful to students from diverse backgrounds bearing in mind the socio-historical moment within which education found itself.

Research on inclusive education in the developed world has been extensive. There has been less research completed in developing world countries. Situated in the Pietermaritzburg area of KwaZulu-Natal (KZN), South Africa, a developing world country, participants in the current study were parents of children with disabilities, aide workers, regular and special educators, managers who made decisions affecting the education of these children, and the children themselves. The research is positioned in the theory of interpretivism which provided the opportunity to give a voice to the participants, to interpret how they made sense of their world. The methodology used was qualitative description with an evaluation component. Qualitative description allowed the discovery and understanding of "a phenomenon, a process, or the perspectives and worldviews of the people involved" (Merriam, 1998, p. 11). Data are presented so that the participants' point of view could be understood and made explicit (Artinian, 1988). Using qualitative description, this current study explored the beliefs about disability and inclusive education specifically of stakeholders in the education of disabled children. The evaluation component provided the means of ascertaining the extent to which disabled students were having their educational needs met, and the extent to which the policy ideals of inclusive education, as articulated in *White Paper 6* (Department of Education, 2001), were being achieved.

Inclusive education in this present study is viewed as a multifaceted construct which shares a reciprocal relationship with various theoretical determinants. The

determinants considered in the present study are (a) concept of *other*, (b) disability discourse, (c) equity, (d) reconceptualist/incrementalist approaches to inclusive education, and (e) prerequisites for regular and special educator buy-in.

Findings revealed that there was evidence of inclusive education beginning to be implemented in KZN in that barriers to learning for many students were being addressed and removed. The specific provision in policy documents directed towards children with disabilities was behind schedule, however, and there was little evidence of full inclusion of students with disabilities in regular education. Reasons for this were multiple and were explored in relation to criteria at a macro- and micro-level, distilled from the literature, which seem to be necessary for the successful inclusion of students with disabilities.

The most significant macro-level factors were (i) the legacy of apartheid and the democratic process, moving towards a liberal democracy, still being in progress; (ii) the discourse around disability espoused by the majority of the population resulting in high levels of ostracism of the disabled; and (iii) the disabled becoming lost in the wide definition of need in the barriers to learning approach to inclusive education.

The most significant micro-level factors were (i) regular educators being reluctant to embrace the inclusive education initiative because of problems they had encountered with another recent initiative, the implementation of Outcomes Based Education; (ii) special educators fearing for their students if they were to be included without the requisite preparation and support; and (iii) some parents lacking the efficacy to access education of any sort for their disabled children.

These macro- and micro-level findings exist within a multifaceted array of factors, an intricate web of nuances and complexity.

## **1.1 Introduction**

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This thesis is entitled “Inclusive education a decade after democratisation: The educational needs of children with disabilities in KwaZulu-Natal”. The title reflects the original overarching area of investigation at the start of the study, exploring how the needs of the disabled were being met in education, which became refined during the process of the research.

### **1.1.1 Description of the Structure of the Thesis**

In Chapter 1, I begin with a description of the structure of the thesis. This is followed by *A tale of two schools*, a snapshot of two schools which took part in the study selected from the summaries of the ten schools which participated and which are included as Appendix a. These snapshots depict the diverse reality in KwaZulu-Natal (KZN) at the time of the study, and immediately reasons for some of the tensions, which will be explored through the thesis, become apparent. This chapter also encompasses the rationale for the study, the research questions, and an overview of the themes that provide the background to the study and which form the foundation upon which the research was built.

Chapter 2 includes the background to the study in four themes, identifies gaps in the literature, and leads to the derivation of the research questions.

Chapter 3 describes the research design utilised to achieve the aims of the study. The methodology and the methods used to gather data are discussed. Sampling used and the design for data analysis are described, and issues of validity and reliability are addressed. The research process is made explicit, including ethical considerations and the role of the researcher, and a description of the participants in the study is provided.

Chapter 4 includes a description of the findings of the study in three sub-sections:

(i) conditions at the time of the current study, (ii) strategies, actions, and interactions, and (iii) consequences of the conditions and the actions.

Chapter 5 encompasses discussion around the findings and provides answers to the three research questions. It is in the discussion and conclusions drawn in this chapter that my original contribution is to be found. Finally, operating parameters of the study and suggestions for further research are presented.

## **1.2 A Tale of Two Schools**

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It was the best of times, it was the worst of times, it was the age of wisdom, it was the age of foolishness, it was the epoch of belief, it was the epoch of incredulity, ... it was the spring of hope, it was the winter of despair, ...

*A tale of two cities* (Dickens, 1906, p. 1)

### **1.2.1 A Snapshot of School C**

Pietermaritzburg, South Africa, November 2003. As I drove up to the school gates a uniformed guard snapped to attention and saluted. He marched from his guardhouse to ascertain my business. I told him my name and clearly I was expected as he nodded politely, pushed the remote button causing the high, spiked gate to slide open obediently, and directed me to where I should park. As I drove through the gates he once again saluted. I proceeded up the tree-lined driveway and, rounding the bend, was greeted by the sight of beautiful, imposing Victorian-style buildings neatly edged with manicured lawns and surrounded by ordered gardens. The barbed wire and the electrified gate, representing the constant need for security in this city, faded as I wandered up the path, past an ornate fountain, and trod up the flagstone steps.



The wood-panelled reception area, with its high wooden beams and elegant furnishings, was cool and welcoming. One of five secretaries informed a staff member, one of the school's management team, that I had arrived. She was able to spend an hour with me as she had non-contact time then, showing me around and speaking of the achievements and aspirations of this school. Clean, carpeted classrooms, each with a dataprojector, a computer, and whiteboard, comfortably housed sufficient desks for a maximum of 35 students. Benches under the trees provided respite from the heat for the students. A school hall with stage and sophisticated lighting, sports fields with immaculate markings, a swimming pool, squash courts, an Astroturf hockey field and a cricket pavilion bore testimony to the balanced nature of the education available to the 1200 students of this government school, just one of whom had disabilities.

Of the 1200 students who attended this school, 207 were Black<sup>1</sup>, 37 were Coloured, 84 were Indian, and 75% were White. The staff was multi-ethnic, the majority being White. Most students paid the school fees and consequently the school was able to employ sufficient teachers to keep class sizes to between 30 and 35 students. Class sizes would otherwise have been around 60 students.

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<sup>1</sup> During the apartheid era people were classified as either White, Black, Indian, or Coloured (mixed race). The use of these words does not denote any desire to perpetuate such divisions, but they are useful in the consideration of historical events, the legacy of apartheid, and progress towards a democratic, non-racial society.

### *School C positives*

The generally co-operative attitude of students, who were proud to be members of this school community, was seen as a positive by the teachers of School C, as well as the good academic results the students achieved. Strong traditions meant that students were generally very well behaved and motivated to achieve, and the teachers were happy to be employed at this school. Many of the staff had taught at this school for tens of years, which is likely to be indicative of their job satisfaction.

### *School C and inclusive education*

The one student with disabilities at School C had an artificial leg and did not need any adaptations or accommodations for his education. The school had accepted another disabled student, who had a cochlea implant and was hearing impaired, to start the following year. These students had been accepted into the school only because of familial links to the school. These teachers felt that at secondary level, with the increased administration generated by OBE and the continued high expectation of parents despite larger classes, it was unrealistic to expect teachers to adapt programmes or practice to accommodate the needs of students with disabilities. They were not opposed to the notion in theory, but noted the costs as prohibitive when they were struggling to maintain standards with constantly rising costs as it was. They maintained that until they saw the supports, financial and in teacher preparation, they would rather preserve the status quo and have separate schools for students with disabilities.

## **1.2.2 A Snapshot of School J**

The next week I drove to a deep rural school in the Impendle area, some 100 kilometers from Pietermaritzburg. I ascertained where I should go from the farmer on whose land the school stood. He explained that I should “park at the gate up yonder” and then make my way down the side of the mountain to the school nestled on the valley floor below. Could I drive down? No, too steep and no road – even his Landrover would not be able to drive down. The backdrop of the towering mountains dwarfed the one-roomed school, a deserted church building, which stood in derelict fashion with its

leaky blue roof amongst the traditional dwellings of the farm workers. It was a twenty-minute walk down and double that on the return trip. A narrow track, rutted from use by cattle, school children, and their teacher, zigzagged down the mountainside to the school and settlement below.



Although I had organised my visit to this school, the teacher was surprised to see me and wondered if I was from the department. If so, I would be the first person from the department ever to visit the school. When I explained that I was not from the department she thought that made more sense and remembered that she knew I was

coming but was not sure when, and in any case she thought nobody would make the trip down to the school as there was no road. She was pleased to see me and to introduce me to the children. Noticing the perspiration dripping from me, she apologised that she could not offer me a drink and cautioned me against drinking the water in the creek as it was contaminated from the children relieving themselves in the field nearby since the school had no toilets. It was dark and gloomy inside, sunlight filtering in through the few, high windows, a narrow door, and the holes in the roof. Rows of children were seated on benches and when they wrote they kneeled on the floor and placed their books on the bench. A blackboard with a large chip out of one corner stood leaning drunkenly against the wall. The teacher explained that with no easel it was difficult to write on the board as it was so low. There was no electricity and minimal resources at this government school which served 48 students from grade 1 to grade 8, and one teacher. Four of the students had mild or severe intellectual impairment; one was visually impaired but did not wear glasses as her parents could not afford to pay for them; none had other physical disabilities as a wheelchair user would never be able to get to the school. As student numbers were then above 45 the teacher was hopeful that another teacher would be appointed soon.

#### *School J positives*

There was a strong sense of community amongst the students who all lived on farms abutting the valley where the school stood. Students could all walk to school and were not reliant on public transport which would have made the school inaccessible to them. Farmers on the adjacent farms often picked up the students who lived on their farms and dropped them off closer by. The parents, the vast majority of whom were themselves illiterate, were supportive of their children's schooling as they saw education as the only way their children would be able to escape the poverty trap which had ensnared them. They were grateful for the school and the opportunity it offered their children. The children in turn were motivated and co-operative.

#### *School J challenges*

Having no electricity was a problem. The teacher had applied to a company which had promised to provide them with computers when they got electricity. This was not

imminent. The child with visual impairment would benefit from enlarged print but with no photocopier this was not possible.

With the implementation of OBE, this teacher had frequently had to make the journey into Pietermaritzburg to attend meetings and workshops. These travel costs she covered herself as none of the families whose children attended her school were able to afford school fees. All lived in poverty. Also, when she was away from school attending these workshops, the children were left without a teacher. For this reason she had applied for another teacher to teach at her school as well and she had supported this application with the increased number of students. She was hopeful that the department would provide her with another teacher but she pointed out that the person they had mentioned to her as a potential second teacher at the school, had matriculated (high school exit examination), but had no tertiary or teacher education at all.

Resourcing, in general, was a problem at this school. There were some exercise books and pencils provided by the department but extras like coloured pencils, paints, and cardboard were not provided.

#### *School J and inclusive education*

This teacher was positive about the notion of inclusion. Hers was the only school that children in the area could attend, and if they did not come to her school, they would not be afforded any schooling anywhere. She was quite happy to include students with disabilities, as during her three-year teaching diploma she had learnt about inclusion and felt immediately she would support this philosophy imbued with the principle of social justice.

When children were seven they entered her school. All of them had isiZulu as a home language, and no English at all. As a result, she accommodated them by using isiZulu to introduce concepts, and gradually included more and more English as the medium of instruction during the eight years they spent with her. While she said she knows she

was not supposed to, she taught students to read through medium of isiZulu and then they transferred that knowledge to English as their skill level in English improved<sup>2</sup>.

It was interesting to hear this teacher's flexibility explained in a matter-of-fact way. She did not feel she was well supported by government departments so she felt free to select how many and which of their instructions she would follow.

She did not think her students were being provided with a very good education, but she shrugged and explained that she did the best she could and nobody can do better than that. If she had another teacher, fewer children or a smaller range of ages and stages, and more resources she was sure she could do a better job and that the children would benefit. That was not how it was, however, and she would continue to do the best she could with that which was provided for her.

### **1.3 Rationale for the Study and its Underpinning Principles**

The snapshots of Schools C and J provide insight into the real situation in KZN and the disparity that existed between schools when this study took place. A new curriculum had been instituted post-democracy and new policy had been written affecting students with disabilities. It was timely to ascertain whether these initiatives were being successfully implemented from the perspective of the disabled<sup>3</sup> and those concerned with their education, and whether the quality of their education was being enhanced.

The first principle on which this research was founded was that of equity: that all students should have access to equitable education. Immediately the snapshots provide evidence of inequity. The apartheid regime had not been founded on a principle of equity and the new government, with the advent of democracy, tried to

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<sup>2</sup> This teacher, an isiZulu First Language speaker, favoured a phonics approach to the teaching of reading and isiZulu is a phonically regular language. She felt that students progressed more quickly if they learn to read in their mother tongue while their English was given the opportunity to improve as they listened to instruction of older students taking place through medium of English.

<sup>3</sup> The terms *the disabled*, *disabled children*, and *disabled people* are consistent with the preferred terminology used by the United Nations Convention on Rights of Disabled People and recommended by Disabled People South Africa (DPSA) (2005).

address equity issues in all social policy. The dilemma facing the government was to write educational policy which, when translated into practice, would improve the standard of education offered to students at schools such as School J while at the same time allow the maintenance of the high standards achieved in the previously privileged schools such as School C. There was, furthermore, the challenge of providing a curriculum that would be meaningful to students from diverse backgrounds bearing in mind the socio-historical moment within which education found itself. The aspirations articulated in the policy documents were located in the traditions of the *developed*<sup>4</sup> world which were more easily embraced by urban high socioeconomic status (SES) schools than in rural *developing* areas. A reflection from my fieldnotes, after the visit to School J, highlighted the tension:

It is fascinating and awesome to consider how teachers are expected to cross the gulf between the small feudal world of their rural children and the demands of a curriculum geared to the modern world. With few aids this teacher must teach books written by overseas people, which contain big wide world concepts like the ocean and ships. None of these children has ever been to Tegweni (Durban) to see the waves, to see the stately ships plying up and down the coast. The challenge is to not perpetuate the travesty that confines them to the small world because leading them to the modern one is too difficult. (Fieldnotes, dated 03/12/03)

Teachers of such students had a daunting distance to take their students and these were frequently the most poorly resourced schools as far as physical and human resources were concerned.

Human Rights was the second principle underpinning the research. This principle assumes that “everyone has a right to education. Education shall be free, at least in elementary and fundamental stages. Elementary education shall be compulsory” (Universal Declaration of Human Rights, 1948 article 26). International consensus regarding the inclusion of students with disabilities in regular schools as of *right* has become formally expressed in a number of charters issued on behalf of the United Nations. The snapshots of the two schools provoke the question why, at the better resourced school, fewer than 0.1% of the students were disabled, whereas at the rural

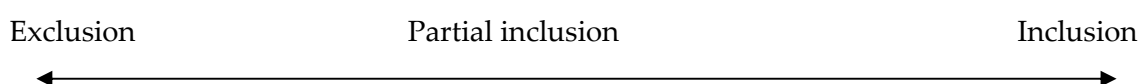
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<sup>4</sup> I recognise that *developed* and *developing* are problematic terms, and therefore choose to question their validity by the use of italics. The alternatives of First and Third World are as problematic, while the more realistic ‘One Third’ and ‘Two Thirds’ world may need more explanation than their value warrants.

school more than 10% were disabled. Why was it that at a school where the curriculum was least relevant and implemented with difficulty, education per se was accessible to disabled children? In light of educational policy promoting inclusion in education, what stopped disabled children accessing education at regular schools such as School C?

## 1.4 The Field: Inclusive Education

Commitment to a single, inclusive education and training system has been the aspiration of reform in education in a democratic South Africa. This has been promulgated in concert with developments in the developed world which has seen most countries aspiring to move from exclusionary practices in education to inclusive education. The progression from separate education for students with disabilities in an exclusionary framework to inclusive education can be represented as on a continuum.



At one end of the continuum special education, as a discrete educational entity, provides services for students with disabilities who are compelled to attend separate schools. While most countries have special schools, how many depends on the country's philosophy and policy regarding the education of students with disabilities. At the other end of the continuum, society conceptualises all types of diversity as the norm, disability is considered part of normality, all barriers to learning for all students are identified and removed, and there is no separate education, support or tuition offered outside regular classrooms. Lying between these two extremes are provisions which see students with disabilities included in regular classrooms for part of the time, and withdrawn for specialist therapy or tuition for part of the time.

## 1.5 The Research Questions

This current study explored the beliefs of stakeholders in the education of disabled children about disability and inclusive education. It investigated to what extent the

educational needs of children with disabilities were being met in KZN a decade after democracy. It explored the extent to which the philosophy of inclusion, espoused in the South African education policy documents and which seeks to improve learning outcomes for students with disabilities, was being implemented in practice. A primary focus was to determine whether regular education was indeed becoming accessible to students with disabilities.

In *Education White Paper 6* (Department of Education, 2001), which addressed specifically provision for students with disabilities, inclusive education is located in the dialogue of social inclusion<sup>5</sup> versus social exclusion<sup>6</sup>. The focus is on the identification and eradication of barriers to learning and participation including curriculum barriers, HIV/AIDS, poverty, and barriers in teaching capacity due to limited teacher education. While it is acknowledged that there might be room for improvement in many areas of education, and that other aspects would benefit from research, the focus of this present study was students with disabilities. Some of the poorest areas in South Africa are in KZN, and it was illuminating, especially from the perspective of equitable resourcing for the disadvantaged, to gain the perceptions of these people.

## 1.6 Definitions

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In order to avoid confusion or misunderstanding it is useful to define some of the terms which are used throughout this thesis.

There is no universally agreed definition of *disability* (UN Enable, 2005) but on the UN Enable website it is defined as “any restriction or lack (resulting from impairment) of ability to perform an activity in the manner or within the range considered normal for a human being” (UN Enable, 2005 para. 3). The Americans with Disabilities Act, refers to the widely accepted definition of *disability*: “a physical or mental impairment that

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<sup>5</sup> Inclusion: barriers to full participation in society are identified and removed. Students with disabilities participate fully in regular education with adaptations made to the environment or the curriculum as needed, to make education accessible to them.

<sup>6</sup> Exclusion: within society, people with disabilities experience exclusion through being denied the opportunity to participate fully in everyday life in their community. Within the realm of education, students with disabilities are denied access to education in regular classrooms as they are seen as unable to cope in this environment.

substantially limits one or more of the major life activities” (Government of the United States of America, 1990). These major life activities include walking, speaking, seeing, hearing, learning, breathing, and performing manual tasks such as dressing oneself. The similarities of these two definitions show that there is some consensus in understanding the term, and they capture the meaning of disability as it is used in this thesis. People with disabilities are referred to as *the disabled*<sup>7</sup>.

Some authors come from the standpoint that while every person has needs and these vary widely from individual to individual, the disabled (as defined above) have *special needs* in that they require adaptations to the environment or specific assistance in order to function in a non-disabled world. The term *special needs* is used interchangeably by them with *disabled* as they consider them to be synonymous. For the purposes of this thesis, however, it is necessary to make a distinction. Here the term *special needs* is defined as encompassing a wider sense of need that might occur because of such factors as poverty, abuse, cultural diversity, or language diversity. It is not used synonymously with the term *disabled*.

*Special education* is a term used to differentiate between regular education which non-disabled students enjoy, and the policies, theories, and practice of education of the disabled.

Some students with disabilities need adaptation to the environment in order to be able to access education. An example would be a student who cannot walk and uses a wheelchair. This student may also need adaptations to be made to the curriculum (for example the Physical Education curriculum) in which case the term *special learning needs* is used to indicate that these learning needs are different from general functioning needs. Another student with intellectual impairment may not require adaptations to the physical environment but could have *special learning needs* requiring

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<sup>7</sup> I recognise that the term *disabled*, inasmuch as it is negative, could be viewed as disempowering people so labelled. This would be congruent with the political sensitivity argument which suggests the emphasis should be on the person first i.e. *person with disabilities* or, frequently, *person with special needs*. I use the term *disabled* as it is consistent with the preferred terminology of, inter alia, DPSA (Disabled People of South Africa, 2005), and also to distinguish between needs that arise as a consequence of an impairment as opposed to special needs that might occur because of social factor such as poverty or abuse.

adaptation of the curriculum, or possibly be considered to benefit from additional support or individual tuition at times.

## **1.7 Themes that Form the Background to the Study**

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Inclusive education drives the current study and this is addressed as the first theme in chapter 2. There has been considerable debate in the literature about what constitutes inclusive education, what it looks like when successfully achieved, and what aspects enhance or inhibit the attainment of successful inclusive education. Are students experiencing inclusive education if they are not with their peers at all times? How do accommodations and adaptations work best? Which provisions best meet the educational needs of students with disabilities? Internationally, inclusive education has not been without its problems. In the current study the recipes for successful inclusion in education and the challenges were considered in relation to policy and practice in KZN, South Africa.

An understanding of the setting and context of this study is fundamental to the interpretation of the data of this study. South Africa is a new democracy, but whether it is a consolidated or a liberal democracy is open to debate. Since the government aspires to epitomising a liberal democracy where minority rights (of groups such as the disabled) are recognised and protected, it became necessary to investigate the process of democratisation. The democratisation process is the second theme forming the background to the current study and an evaluation is made, from the literature, of the current reality in South Africa in these terms. Consideration is then given to how these factors have impacted on education policy and practice for the disabled in KZN. All recent policy in South Africa has attempted to address and redress the inequities of the apartheid era, but the legacy of apartheid is not inconsequential in many social areas, including education.

KZN has an estimated population of 11 million people making it the most peopled province in the new constellation of nine provinces in South Africa. Effectively KZN has the largest teaching corps in the country with some 74,000 teachers practising in

5,751 schools (Department of Education, 2003). Despite these provisions, in 1997 it was reported that “more than half a million children in KZN of school-going age are not attending school” (Jessop, 1997, p. 5). With the demise of apartheid, many White, Coloured and Indian schools have admitted Black students to these better resourced schools, but the intake of all previously Black schools has remained almost exclusively unchanged. After the release of Mandela in 1990, when the initial faltering steps were being taken towards the first democratic elections in 1994, Hartshorne (1992) described the typical picture of neglect in many rural and township settings:

All over the country there are dilapidated buildings, crowded classrooms, rudimentary school furniture, broken windows, leaking roofs, a lack of adequate sanitation facilities, blackboards and cupboards—all of which contribute to both teachers and pupils feeling that what they are doing is not regarded as important. (p. 54)

With the advent of democracy the hope was that such descriptions would come to be of historical interest only, but as the snapshots of the two schools showed, a decade after democracy, inequities persisted despite the determination on the part of the government to redistribute resources. To understand the discrepancies, and for the interpretation of the data in this current study to be meaningful, it was necessary to have an understanding of regular and separatist special education until 1994. It was, furthermore, important to gain insight into policy and practice in those newly amalgamated areas ten years after democracy. The third theme, therefore, comprises a brief historical overview followed by the current situation in regular and special education in South Africa.

The last theme explored is that of disability discourses in society which underpin many of the beliefs and assumptions of non-disabled in relation to the disabled. Four discourses are described, and their inhibitory or enabling effects on the disabled are considered.

In the conclusion to Chapter 2, the three research questions (see also 1.5) are derived. The data from this study were interpreted in light of these themes that formed the background to the study.

## 2.1 Overview

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This chapter includes an overview of what the literature presents on the themes, identified in chapter 1, which form the background to the current study:

- the field of inclusive education
- democratisation – the context for education in KZN
- regular and special education pre- and post-democracy
- disability discourses.

The references chosen for the literature review are mostly English, as this is the language with which the researcher is the most familiar. The South African government has chosen a developed world perspective as the philosophical underpinning in their policy documents, therefore this is also the emphasis in the references selected. In the sections where democratisation and educational policy during apartheid and subsequent to democracy in South Africa are considered, however, authors writing from a developing world perspective are included and Afrikaans as well as English references are referred to.

Extensive use of electronic databases was made in the accumulation of pertinent references to ensure comprehensiveness. The databases used were:

- A+ Education\*
- Academic Research Library\*
- Academic Search Premier\*
- Annual Reviews
- APAFT – Australian Public Affairs Full Text
- Blackwell Synergy
- Cambridge Journals Online
- Career and Technical Education
- EBSCO Megafile Premier\*
- Education: A Sage Full Text Collection\*

- Emerald Fulltext\*
- ERIC\*
- Expanded Academic ASAP\*
- FirstSearch
- Humanities International Index
- InfoTrac OneFile
- INZ – Index New Zealand
- JSTOR\*
- NAMTA Montessori Bibliography
- OVID databases
- ProQuest 5000 International
- ProQuest Dissertations and Theses
- ProQuest Education Journals\*
- PsycINFO
- Scopus
- Sociology: A Sage Full Text Collection
- Taylor and Francis Journals
- VOCED
- Web of Knowledge\*
- World of Learning

Those marked with an asterisk (\*) were the ten most frequently used.

The terminology of the literature search consisted of sets of terms around each topic. In the section on inclusive education, for example, there was a set of terms around inclusive education, a set around special education needs, and a set around inclusion in practice. Each set was then analysed and a much broader list of related terms and synonyms compiled to maximise the probability of retrieving primary studies. The search for additional studies for consideration was accomplished with the scanning of reference lists derived from database searches. This process also suggested new keywords which led to further searches for primary sources. After considering primary sources in depth, discussion articles on the themes were sought and utilised.

Although databases contributed the major sources for searching, the following limitations were considered:

- All the databases used covered journal articles, but very few covered books or book chapters.
- Because of restrictions that each database contains, there is no guarantee of the comprehensiveness within the topic. Indeed some important journals for the current study such as the South African Journal of Education were not accessible on the databases used.
- Some databases give only the citations, some an abstract, and some the full text. If the full text of a potentially useful article was not available online, it was accessed through the interloan service at the Auckland University of Technology library.
- Terms in common usage within this field (such as social discourse and medical model) can be difficult to find if existing controlled vocabularies on the databases do not reflect the latest concepts in the education field.

Where possible the database search was supplemented by hand searching some of the journals available in hard copy in South Africa, but not accessible on the databases. This proved an extremely time-consuming exercise but it did identify additional useful articles.

The literature search identified in excess of 5,000 articles, books, book chapters, theses, and conference papers, of which over 350 have been included in this background to the study.

## **2.2 Inclusive Education**

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### **2.2.1 Introduction to the Field**

In this section of the review only articles from a developed world perspective, including studies conducted in the United Kingdom (UK), the United States of America (USA), Australasia, Europe and Canada were used as this is the approach South Africa has chosen to use in its policy documents. It was necessary to explore the field of inclusive education internationally first, before narrowing the context to South Africa itself.

The philosophy, theory and practice of inclusive education link to international expectations on human rights and the disabled and how these drive the notion of inclusive education, which is discussed in detail with reference to global trends and experiences. Discussion then focuses on what inclusive education is, what needs to happen for it to be successful, how its success is evaluated, and differing views on its implementation. The discussion concludes with the implications for the current study.

### **2.2.2 Historical Roots of Inclusive Education**

#### ***Human rights***

On December 10, 1948, the international community adopted the Universal Declaration of Human Rights (Universal Declaration of Human Rights, 1948). It recognised the inherent dignity and inalienable, equal rights of all people around the world. The preamble notes the reasons for, and commitment of, the United Nations General Assembly to the 30 Articles they passed unanimously. Where special education features is in Article 26 which states: “everyone has the right to education. ... Parents have a prior right to choose the kind of education that shall be given to their children” (article 26).

In the years following the Declaration, many countries honoured the spirit of the Declaration, but the reality for the disabled was that decisions regarding their education rested with specialists in the medical and educational fields. What resulted was separate, different, often inferior education for students with disabilities. At that time the medical model was predominant as was the practice of exclusion.

Over the ensuing 50 years, social attitudes towards other groups previously considered 'inferior' such as women, blacks and homosexuals were revolutionised to a position of recognising their human right to dignity and individual choice. In contrast, the disabled community formed a part of society that might be described as embarrassing, inconvenient, and perhaps better ignored.

### *Roots of inclusion translated into the education arena*

With the development of the New Right in many countries, lobby groups and individuals began to promote the swing against exclusion towards the ideal of total inclusion. From separate schools, institutions and sheltered employment, the ideal is for the disabled to live fully integrated lives in their communities.

As the discussion, discourse, research, and changes in attitudes in society in general occurred, practice changed at times, but not always in favour of children with disabilities. In 1994 representatives of 25 international organisations and 88 national governments therefore met in Spain under the auspices of UNESCO. They drew up the Salamanca Statement on Principles, Policy and Practice in Special Needs Education. Five principles were proclaimed to issue from the Universal Declaration of Human Rights. They were:

- Every child has a fundamental right to education, and must be given the opportunity to achieve and maintain an acceptable level of learning,
- Every child has unique characteristics, interests, abilities and learning needs,
- Educational systems should be designed and educational programmes implemented to take into account the wide diversity of these characteristics and needs,

- Those with special educational needs must have access to regular schools who should accommodate them within a child-centred pedagogy capable of meeting these needs,
- Regular schools with this 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, p. 10).

Supporting these principles, those favouring the notion of inclusive education argue that maintaining two educational systems (regular and special education) is unfair and inherently unequal (W. Stainback, Stainback, & Bunch, 1989). Furthermore, they point out that the label 'special' makes those children so labelled separated in their own minds, in the minds of their peers and in the minds of teachers. Thus stigmatised, the students' progress is hampered. Indeed Clough and Corbett (2000) and Mittler (2000) suggest that one of the main reasons that disabled students are frequently not successful is because there is such a low expectation placed on those students who have been identified as being disabled. Proponents of restructuring educational systems also believe that all students differ to varying degrees and it is not possible to make a neat cut to separate out those with special educational needs. They feel that with careful planning within a unified system of education it should be possible to meet the various needs of all students, not by denying difference, but by accommodating it.

Education, seen within the rights model, requires that the environment be adapted to make education accessible as of right to all people. Acknowledging this philosophy of inclusion, school systems throughout the world began to accept the need for inclusive education (J. M. Baker & Zigmond, 1995; Mittler, 1995; Sebba & Ainscow, 1996).

### 2.2.3 Specificity of Inclusive Education

Part of the dilemma is caused by there being no single definition of inclusive education (Low, 1997; UN Enable, 2005). It has been a process, and while there are still different conceptualisations of what inclusive education means, there is some consensus that “inclusion is about gender, ethnicity, poverty, sexuality and not just about disability” (Culham & Nind, 2003, p. 73). Indeed, “many books about inclusive education focus on disabled pupils and pupils with learning difficulties” (Nind, Sheehy, & Simmons, 2003, p. 3), but this is, for many, too limiting a definition.

The focus in the wider definition for inclusion is on the restructuring of schools and systems to increase the participation of those with disabilities, amongst others, as of right, and for them to be provided with opportunities and to be treated with respect. In this way the need of a person is not evaluated as good or bad, but is considered ordinary, and, within inclusion, education and other services are improved to overcome barriers to learning (Ainscow, Booth, & Dyson, 2004).

Inclusion of children with disabilities in regular schools was not quickly or easily accomplished, however. Most of the initial research was done by those in the special education field, and their aspirations were affected by their training which was frequently within the medical model and they were used to working within a framework of exclusion. Special educationists had always said that children with disabilities need to be identified as exceptional, and that special expertise is required to teach them – expertise that regular classroom teachers may not have. They felt that children who need special education and funding must be clearly identified so that appropriate services could be provided to meet their needs. They maintained that special services would be lost unless the students and the funding were clearly defined and targeted (Doyle, 2003). Tentative steps were taken for students with disabilities to be mainstreamed where it was considered appropriate to the needs and capabilities of the student.

While the terms mainstreaming and inclusion are used interchangeably by some authors, others see a difference in the terms. For many authors mainstreaming usually means the placement of students with disabilities in regular education classes with some time spent in separate resource room placement. Inclusive education means there is no separate special education placement for any students, and all students are placed full-time in the regular classroom with there being appropriate special education supports within that classroom (Garvan-Pinhas & Schmelkin-Pedhazur, 1989; Kauffman & Hallahan, 1995; Slee, 2000).

The shift towards inclusive education comes about because educators believe that inclusion centres around a philosophy of acceptance and tolerance which “is the very core of social responsibility” (Reardon, 1994, p. 19). It is of course much easier to see intolerance especially when it involves any violation of human rights, than tolerance which is less easily distinguished. Tolerance is often seen in positive actions that advance the achievement of human rights for others, and those which further peace. Tolerance in education ensures that a framework is developed within which all children are valued equally, are afforded equal opportunities at education and are respected, irrespective of gender, ethnic origin, ability, or language (Mittler, 2000). This is a further conceptualisation of inclusion that centres on collective belonging, on respect, and on equality (Thomas & Loxley, 2001). Yet another conceptualisation of inclusion, positive responses to diversity, is described by Barton (1997).

With these broader concepts of inclusion there is the stronger probability of positive action as a greater number of students stand to benefit from policies and practice that enhance the learning of all. There is a larger critical mass, as it were, and thus a stronger voice calling for inclusive education.

Mittler (2000) holds that inclusion is not simply about placing students with disabilities in schools; it is rather about changing schools so that they are responsive to the differing needs of all children. Booth and Ainscow (1998) explain it in terms of seeing inclusion as meaning that schools respond to the diverse needs of all students who are seen, then, as part of us. This, they maintain, counters the inclination on the part of practitioners and policy makers to see a group of disabled learners as students with

difference who become subliminally labelled as *them*. Several authors agree with this tenet (Low, 1997; Muthukrishna, 2000; Slavin, 1990; Slavin & Madden, 2000; Wedell, 1992), emphasising that changes in whole school systems become necessary rather than just seeing the re-placing of children from special schools into regular education.

It follows, therefore, that those supporting this reconceptualisation of education for disabled students would not support those who would see these students only partially included. They hold the view that this 'merger' approach defies the objective because "such an amalgamation appears likely to maintain a medical, curative model of education that excludes those labelled as 'special' from the curriculum" (Ballard, 1999, p. 1). Those opposing the melding model would rather view inclusive education from an inclusive perspective, creating a completely different alternative from special education. The notion of inclusion, they argue, cannot refer only to some students. It has to refer to all (Booth, Ainscow, & Dyson, 1998). True inclusive education, from this perspective, would see all barriers to learning for all children being identified, addressed, and removed.

#### **2.2.4 Key Elements of Inclusive Education**

While there is no single definition of inclusive education, there is general consensus internationally amongst educationists as to its meaning. Mitchell (2001) summarises as follows:

(Inclusive education) is commonly taken to mean that schools: (i) accept the rights of all students to enrol and receive education, to be treated with respect, to have dignity and independence, to have access to a fair share of available general and special education resources and not be directly or indirectly discriminated against; (ii) reduce barriers to learning; (iii) have a philosophy of providing education for all students, including those with special educational needs; (iv) recognise and respond to the diversity of their special educational needs; (v) accommodate to students' different styles and rates of learning; (vi) ensure equality of education opportunity through appropriate curriculum, school organisation, use of resources and partnerships with their communities. (p. 330)

Lipsky and Gartner (1998) analysed the findings from surveys from nearly 1,000 school districts in the UK and found seven key factors necessary for inclusive education:

visionary leadership, collaboration of all stakeholders, appropriate and focussed use of assessment, sufficient support for both teachers and students, adequate funding, positive parental involvement, and effective programme models with adaptations to curriculum and instruction.

Effective inclusion in schools is complex and several components of the educational system have to be reconstructed to achieve inclusion. According to Gregory (1996), it is useful to consider these under the following headings:

- Staff development – pre-service, in-service education and collaborative planning
- Programme arrangements – individual programmes where necessary but always in the context of the curriculum with individualised goals
- Environmental arrangements – allowing equal access everywhere to all students, adaptations to playgrounds and classroom layout
- Materials and equipment – access to them by all children, and the individualisation of materials where necessary.

### *Staff development*

Fullan (1991) notes that teachers are renowned for resisting change and lists some reasons: Teachers are so caught up in day-to-day events that they have a short term focus, they expend an enormous amount of energy innovatively responding to the ever-changing situations that occur in their classrooms, they are largely isolated from other adults, they carry on a range of activities simultaneously, and are aware that their pupils will only learn optimally given a positive personal relationship with their teacher. The demands of teaching are such that teachers are frequently stressed and exhausted. Furthermore, “all change involves loss, anxiety, and struggle” (p. 31) and he goes on to emphasise that while change is sometimes initiated by people who voluntarily participate in it, often it is imposed on participants. He concludes that “no matter how promising an idea might be, it cannot impact student learning if it is superficially implemented” (p. 32) and if the implementation of a new philosophy to teaching is daunting, it might well be implemented superficially. He emphasises that strong leadership is key if other vital factors, such as resources of time, ideas, expertise, and materials, are to be achievable.

Echoing these sentiments Bourke, Kearney and Bevan-Brown (2004), providing a New Zealand perspective, state:

While policy makers may carefully labour over the development of the key ideas, the rhetoric and the resourcing implications, it is the teachers who are the ones who ultimately translate policy rhetoric into practice within a classroom setting and turn it into reality for themselves and their students. Teachers' perceptions of policy are shaped by their understanding of the policy rhetoric and their belief in the usefulness and value of that policy. (p. 150)

In their evaluation from 225 schools in the USA which had implemented the Success for All programme, a programme requiring whole school restructuring for schools that serve students at risk of failure, Cooper, Slavin and Madden (1998) "identified school commitment to reform as one of the paramount issues", and also that "all stakeholders must have a shared vision for change" (p. 399). This view is supported by the synthesis of ten in-depth studies from six countries reported by Nind and Wearmouth (2005) describing successful inclusive practices. They stress the need for all teachers to share and understand a common philosophy within the school where individuals who experience difficulties are respected.

While many teachers support the right of all students to be educated in regular classrooms, some lack confidence in their ability to meet the needs of all the students with increasingly divergent needs (J. M. Baker & Zigmond, 1995; Vaughn & Schumm, 1995). They find the required changes to planning, practice, and assessment overwhelming as they have historically only seen themselves as trained and therefore competent to teach the non-disabled (Ferguson, 2003). Forlin (2001), investigating with 571 regular Australian classroom teachers the potential stressors when including students with moderate to severe disabilities, found their perceived professional competence the most stressful issue. "They are particularly stressed by concern that the education of the majority of children is not affected by their need to focus on the child with a disability" (p. 242) as well as their ability to meet that student's specific needs.

In a study involving 10,000 regular education teachers in the USA, two thirds supported the concept of inclusive education, but fewer than one third thought it was the optimal place for disabled students (Kavale & Forness, 2000). Forlin (2004)

emphasises that both teachers and administrators need be prepared and willing to try new approaches which in turn “require appropriate resourcing (materials, equipment, cooperative planning time for teachers, additional teacher aide time) as not to make these provisions would be irresponsible” (p. 187).

Darling-Hammond (2003) reminds us that reform is rendered effective only if teachers have the knowledge, skills, and commitment to the reform. In research that centres around the development of effective strategies for making policies and practices inclusive, Ainscow (2005) notes that introduction of policies intended to strengthen schools’ capacity to handle change do not necessarily lead to changes in classroom practice. Indeed, practice is unlikely to change unless teachers are assisted to comprehend the difference between what they are doing and what they wish to achieve. In fact, individual desire and commitment to change are essential otherwise collaboration amongst teachers may serve only to reinforce existing practice. The choice made by teachers regarding teaching strategies and approaches are determined by teachers’ beliefs about learning and their perceptions of their students. If teachers can be confronted or surprised by evidence of improved student achievement for students with similar needs to those in their classes, they are themselves more likely to effect change (Timperley, Robinson, & Bullard, 1999; Weick, 1995).

In the introduction phase of educational change, teachers are likely to feel insecure: “Any change implies criticism of existing practice and can therefore be a threatening and painful process” (Barton & Smith, 1989, p. 82). If teachers’ input is not sought in the process of educational change, there is likely to be discontent (Winter & McEachern, 2001). As pointed out by Datnow, Hubbard and Mehan (2002) educational reforms rarely originate from teachers, and they posit the usefulness of a co-constructed process. In this process attention is given to:

the possibilities and constraints of the political and economic conditions (including but not limited to the changing nature of work, capitalism, and race, class and gender inequalities etc.) of society at large when we attempt to understand, much less implement, school reform. (p. 17)

The danger, then, regarding inclusive education is that there will be no real change at all or that the change will be merely cosmetic. It would be easy for teachers in regular

classrooms to include the new resources which are the visible signs of change, but which can easily remain just a thin veneer of purported change. A caveat mentioned by Corbett (2001) is that, while the call for inclusive education is compelling, it is vital that it does not become what she terms a “dump and hope” model (p. 11). Teachers need to develop clear belief systems if real change is to be effected. This will provide the impetus for them to engage differently with students, to ponder the strategies and activities that will allow the disabled children in their classes to be included (Fullan, 1991). Supporting this view, Andrews and Lupart (1993) highlight that positive attitudes, beliefs and values of the educators are absolutely essential if there is to be a successful inclusion of children with disabilities in regular classrooms.

The Success for All project in the USA demonstrated that “as long as the norms of schools maintain that some children can never be successful, then many will remain at risk of school failure” (Cooper et al., 1998, p. 400). Guskey (1988) describes teacher efficacy as the a strong belief “that they can help nearly all students learn, even those who may be difficult or unmotivated” (p. 64). Other characteristics of highly effective teachers are that they are very positive in how they feel about teaching, that they are confident in their teaching ability, and see themselves as effective teachers. Guskey (1988) found that teachers displaying these three characteristics “to be the most receptive to the implementation of new instructional practices” and that those “who might be assumed to be less effective, ... appear to be the least receptive to such implementation” (p. 67). Two primary implications of these findings are that:

- strong leadership is necessary for educational improvement to provide the impetus, guidance, and vision to motivate those who might not choose to become involved, and
- “such guidance and pressure must be accompanied by substantial assistance and support so that implementers can increase their skill, ownership and stable use of the innovation” (Guskey, 1988, p. 68).

#### *Pre-service and in-service teacher education*

While it seems there is consensus that pre-service teachers need guidance in how to teach inclusively, and that in-service teachers need complementary education to empower them, it is unclear what the exact content of this programme should be. Even

experienced teachers express a lack of confidence in teaching in the inclusive model (Robertson, 1999). There are studies on teacher competencies in inclusive environments such as two useful ones (Hamill, Jantzen, & Bargerhuff, 1999; Peterson & Beloin, 1998), completed in the USA, but they acknowledge that these are not comprehensive. What these studies highlight is that “both the goal and the methodologies of ‘inclusive education’ are very different from traditional ‘pull-out’ remedial approaches” (Peterson & Beloin, 1998, p. 307). They stress the need for a balance between theory and practical skill that pre-service teachers need to equip them to meet the needs of gifted and talented students, those who live in poverty or with violence at home, students from diverse language and ethnic backgrounds, students with challenging behaviours, and those with developmental and academic delays. In their study across ten schools, Hamill et al. (1999) note the importance of competencies such as:

- flexibility that will allow teachers to adapt programmes,
- collaboration to solve problems and identify best practice to meet specific needs,
- classroom practice which has to change from what had occurred previously, and
- student knowledge which is gained through assessment.

Certain aspects are common to classrooms where successful inclusion is achieved. One of these is the key role that diagnosis plays. Research highlights the critical role of diagnostic analysis of the child’s learning needs in context as there needs to be a match between the instruction given, and the student’s learning needs and behaviour (Ysseldyke & Christenson, 2003). Ysseldyke and Christenson (1994) suggest such aspects as motivational strategies, cognitive emphasis in instruction, provision of relevant practice, informed feedback, teacher expectation, and adaptive instruction.

It is necessary to ensure a climate of respect is developed between peers, and this is accomplished with whole-school commitment to the initiatives and where policy supports teachers in adopting such approaches (Nind & Wearmouth, 2005). In a synthesis of 68 UK studies, these authors conclude that no matter how inclusive the in-class teaching might be, it is the possibility of students with disabilities being humiliated in the playground that will undermine the quality teaching. Academic and

social dimensions are inextricably linked, therefore approaches requiring peer group interaction can have positive outcomes reflected in both academic and social spheres provided teachers have the skills to ensure positive interactions (Nind & Wearmouth, 2005).

Further specific skills teachers need epitomise adaptive education (Walberg & Paik, 2004), incorporating a variety of instructional techniques that favourably impact on student learning. The basis of these is that the programme is systematic, focuses on specific needs of the student, identifies and confronts barriers to learning, and incorporates suitable planning to achieve ongoing responsive education using specialist expertise as necessary. Important to the success of such adaptive education are also sufficient opportunities for children with disabilities to experience well-structured interaction with peers (Hocutt, 1996).

Research suggests, further, that teachers can be inclined to underestimate the achievement of low achievers, inaccurately predicting their responses (Gottfredson, Birdseye, Gottfredson, & Marcinak, 1995). Agreeing with this view, Good (1987) emphasises that teachers must be educated to expect to be able to teach students effectively irrespective of their current performance or level of achievement. The warning is sounded, however, that while high expectations on the part of both teacher and student are crucial, this is not sufficient as beliefs are more involved than purely being related to expectations and “mere training” (Gottfredson et al., 1995, p. 162). Indeed, if inappropriately expressed, it seems high expectations leading to greater pressure, can pose a threat to student learning (Kirsch et al., 2002). In a comprehensive analysis of how high-stakes assessments affect disabled students in the USA, however, it was found that “raising expectations for students with disabilities can set off a continuous chain of positive results” and that these raised expectations “can lead to increased participation supported appropriately with individualized accommodations, improved instruction, and, thus, improved performance” (Ysseldyke et al., 2004, p. 91). These authors also do note that, if teachers are not equipped with the necessary skills, there are pitfalls attached such as the narrowing of the curriculum if teachers teach to the test. There are potentially detrimental outcomes for those students who are not

successful despite an inclusive programme and who often drop out of school as a consequence.

Another key skill required by teachers, if educational inclusion is to be effective, is the caring and support offered by teachers to students with disabilities. In a USA study of 248 regular and disabled middle school students over three years, Wentzel (1997) found that if students perceived their teacher to be caring, this was significantly related to their motivation which links to student achievement. Agreeing with these findings and taking it a step further to include peer relations, Alton-Lee (2003) cites a synthesis of international studies which identified the establishment of caring and an appreciation for diversity in the classroom as important factors in student learning.

Teacher beliefs impact on the way they interact and effect inclusionary or exclusionary practices. In a longitudinal study in New Zealand, Rietveld (1994) found that schools and teachers holding to a personal tragedy model of disability were likely to interact inappropriately with students with Down Syndrome and not respond to their educational needs or treat them age-appropriately. The result was that the other students in the class were inclined to behave in the same way as the teacher.

These aspects of adaptive education, teacher expectations, teacher beliefs about disability, and a positive, caring class climate are aspects that need to be included in pre-service and in-service education if teachers are to feel capable of coping in the inclusive classroom.

### ***Programme arrangement and assessment***

Within regular education the emphasis was, and often still is, on standards and competence. Failure and fear of failure pervade management and the activity of teaching and learning (Fullan & Hargreaves, 1992) and students with disabilities are at the greatest risk of failing. Supporting this view, India (2000) contends that the inflexible nature of the curriculum itself often prevents it from meeting the array of needs that learners might have.

If inclusion is to work, then the goals and assessments need to change as well. An inclusive curriculum should be flexible and be broad enough to encompass aims that respond to the needs and diversity of every individual student in a classroom (Barton, 1993; Bines, 1993). It will be necessary for the curriculum to reflect not only knowledge but also skills development, and the promotion of self-capability. Cognisance of differing learning preferences should prompt teachers to use a greater diversity of activities and only a flexible curriculum will promote this. Assessment should be appropriate to individual goals. Oberg (2005) notes that education systems which are driven by student outcomes rely on teachers carefully choosing what to teach, how to teach it, and how best to assess it. The previously exclusive nature of competitive assessment practices should change (Croll & Moses, 2000). It would be preferable, according to Noddings (1992), to have an overarching goal and she proposes: "...a goal that guides the establishment and priority of all others, it should be to promote the growth of students as healthy, competent, moral people" (p. 10).

While this aim is considered laudable by some, others suggest that it runs counter to the strongly competitive academic emphasis that parents demand from schools, which is often again seen reflected in government policy. The underpinning belief of inclusive education "that everyone is different, everyone is unique, and everyone is valuable for who they are" that teachers need to espouse to accomplish inclusion, can be put in jeopardy, as they "are also obliged to meet the requirements of the standards agenda, which emphasizes, above all else, normative examination results" (Benjamin, 2002, p. 309). Agreeing that there is a tension between 'raising standards' and 'social inclusion', Ainscow et al. (2004) maintain that "the two concepts, as currently defined, operate largely in opposition to one another" (p. 125). Indeed, Slee (2001) notes that schools "feel pressure to assure their communities that standards will be maintained and that difficult students will not come between their children and high academic attainment" (p. 392). Consequently, schools might prefer students who are high achievers and recognise that disabled students put their school result league tables at risk.

Ainscow et al. (2004) agree that while the emphasis on competition and the publication of examination results discourage teaching practices which would be responsive to student diversity, others hold that learning outcomes for all learners are improved

when strategies are employed which promote the inclusion of minority groups. This view is supported by Alton-Lee (2003) in a comprehensive synthesis of quality teaching for diverse students in schooling. It seems that where there is true valuing of diversity and teachers feel empowered to make accommodations and adaptations for individual students, then successful inclusion is achieved.

### *Environmental changes*

If it is to be the right of all children to attend the school of their parents' choosing then many schools would need to effect huge structural changes to make all facilities and curriculum areas accessible to all students irrespective of their disability. These changes are expensive; but the expense is justified in the eyes of those who work within the rights framework. Sometimes the ideals are difficult to achieve. Slee (1996a) maintains that governments promulgate laws requiring the implementation of initiatives that will achieve inclusion of all students but then fail to provide sufficient funding for that implementation to occur successfully.

The funding for environmental changes embed a subset, materials and equipment, which become necessary in meeting the needs of students with disabilities

### *Materials and equipment*

Funding issues abound in this arena. Can a school justify spending a large amount of money on equipment for one student at the expense of much more equipment benefiting a large number of students? Teachers are generally happy to incorporate new materials and equipment into their classrooms as it shows a commitment to inclusive education, but effective use of the equipment to the benefit of disabled students differs from school to school (Fullan, 1991). Clearly this links with teacher education, as individualised adaptation of the available equipment is often necessary if inclusion is to be meaningful for disabled students. If teachers do not know how to use or adapt the equipment it contributes to their feelings of stress and incompetence.

## 2.2.5 Evaluation of Inclusive Education

### *Characteristics of successful inclusive education*

Successful inclusive education is epitomised by accommodations and adaptations leading to all students being active participants in learning (Nevin, 1998; Schumm, 1999). These adaptations and accommodations are not solely effected to ensure access to the education curriculum, but also to classroom routines, as it is in these interactions that students' cultural and social needs are met (Giangreco & Cravedi-Cheng, 1998; Hedeem & Ayres, 2002). As regards instruction, the growing emphasis on differentiated instruction, where lessons are designed to promote active participation of all students at varying levels (C. A. Tomlinson, 1999), makes it easier to include students with disabilities (Hedeem & Ayres, 2002).

It is useful to define what is meant by the terms *accommodation* and *adaptation*. Accommodations are strategies which can be implemented to assist a student to access the regular classroom or curriculum. Janney and Snell (2000) explain that accommodations allow access to the curriculum without changing its content. Examples would include electronic equipment to enhance communication, support of an aide, and classroom seating. Accommodations are most commonly seen for students with physical disabilities, but who have no intellectual impairment. Adaptations, however, are "changes to curricular content or expected student learning outcomes" (Hedeem & Ayres, 2002, p. 181). Adaptations may be made to what is taught, how it is taught, and where or with whom it is taught (Udvari-Solner, 1998).

Successful inclusion occurs when there is sufficient pre-service or in-service training for regular teachers emphasising the benefits of inclusion and with a focus on practical skills improvement (Slavin, 1990; Smith & Smith, 2000). Key aspects for successful inclusion as described by teachers are:

- support staff available,
- assistance being provided in modifying the classroom or activities,
- additional planning time being provided, and

- class size being taken into account with the inclusion of a student with severe needs (Bennett, Deluca, & Bruns, 1997; Smith & Smith, 2000).

A study, reporting the effectiveness of a change model to help schools become inclusive that was instituted in two Southern California school districts over three years, notes that “both general and special educators feel inadequately prepared to serve students with disabilities in general education classrooms” (Burnstein, Sears, Wilcoxon, Cabello, & Spagna, 2004, p. 105). This study supported the view of others concerning class size. In their study, teachers maintained that class size of 30 made them unable to meet disabled students’ individual needs.

For successful inclusion in education, the role of special educators needs to change and to be made explicit (Lamar-Dukes & Dukes, 2005). These authors hold that sharing the responsibility between all the educators at a school, both special and regular, is the essential element in successful inclusion. They hold that special educators will have to learn “how to work more effectively as collaborators in support of students’ participation in general education classes” and support the view that both regular and special educators’ roles change in inclusive education. They maintain that “it is the special education teacher who takes on a highly challenging role” and they note that some special educators have been reluctant or unable to make the fundamental shift necessary “requiring new outlooks and at times causing some discomfort” (p. 55). Supporting this view, Fisher, Frey, and Thousand (2003) analyse the skills and competencies special educators in inclusive schools require in addition to the knowledge and skills they needed in exclusionary settings. These are: “collaborative teaming and teaching, curricular and instructional modifications, personal supports, assistive technology, and positive behavioural supports” (p. 46).

Special educators are sometimes reluctant to relinquish their teaching role in a special education classroom, which allows close association with their own class of students, and to embrace a new role that is multifaceted and includes advice and support to regular teachers, to aides, and to parents, setting up and facilitating Individual Education Plans (IEPs), and an increased administrative load, but reduced interaction with children (Burnstein et al., 2004; Lamar-Dukes & Dukes, 2005).

### *Can the quality of inclusive education be measured?*

Those committed to inclusive education are keen to have its success measured. Studies throughout the world show variable results. In the Netherlands a large-scale longitudinal study was undertaken, comparing the development of matched pairs of primary school children in regular and special education over two and four years (Peetsma, Vergeer, Roeleveld, & Karsten, 2001). The sample was chosen from an age cohort of 5,000 students in special education and 35,000 in regular education. After two years 252 matched pairs remained and after four years 216 pupils were still in the study, but only 40 matched pairs remained. This decrease was caused by educational policy moving quickly in the Netherlands towards the inclusion model, and many of their participants were moved from special schools to regular schools during the four year period of the study. Researchers conclude that, over the first two years, some children did better in regular education while some did better in special schools. Over four years, however, cognitive development in language and mathematics of those students in regular education was significantly stronger than their matched peer in special education.

This mirrored the findings of E.T. Baker, Wang and Walberg (1994) who cite research on 74 studies: 50 completed pre 1980, 11 completed in 1985–1986, and 13 completed between 1983 and 1992. These studies used learning measures generated by standardised achievement tests to obtain academic outcomes. Self, peer, teacher and observer ratings of disabled students' success in relating with others in the classroom were used to evaluate social outcomes. In all instances the students included in regular classrooms were ahead overall. Baker et al. (1994) conclude that "considerable evidence from the last 15 years suggests that segregation of special students in separate classrooms is actually deleterious to their academic performance and social adjustment" (p. 34).

It is important in the interpretation of the data, however, to recognise that many of the studies note that the positive effects of inclusive education do not hold good for all disabled students. Indeed, in the Peetsma et al. (2001) study, the schools students were attending were specifically for students with only mild disabilities which is why so

many of them were included in regular education during the course of the study. Also on “the psychosocial functioning of the matched pupils, no differences were observed after 4 years of participation in either special or regular education” (Peetsma et al., 2001, p. 133). They emphasise, therefore, that particular attention needs to be paid to the psychosocial development of disabled student who are included in regular classrooms. Prior to 1995, it was rare for students with severe disabilities to be included in regular classrooms in the Netherlands and findings from this study include mainly students with mild disabilities. The results might have been different had they included students with more severe disabilities.

As the turn of the century approached, further steps were taken to evaluate the success of inclusive education. An *Index for Inclusion* was developed by Booth and Ainscow (2002) which bears a strong resemblance to the criteria being used in the UK as part of school inspection. The elements selected by the UK include:

- pupils’ experience of schooling,
- the opportunities afforded for them to learn effectively,
- assessment of all students’ access to all aspects of the curriculum, and
- whether all feel happy at school (Booth & Ainscow, 2002).

From the schools’ point of view various aspects are assessed:

- the extent to which barriers to learning are identified and addressed,
- whether difference is recognised, and
- whether disadvantage and discrimination are reduced while positive behaviour and inclusive values are promoted (Corbett, 2001).

In the validation of the British *Index for Inclusion* for Victoria State in Australia, in many cases, “difficulties are explained in terms of the characteristics of individual students rather than in terms of school organization and the teaching/learning alternatives that are provided” (Deppeler & Harvey, 2004, p. 156). The consequence of this is that school policy and structure became secondary to each teacher’s individual practice, thus producing a variety of outcomes and degrees of inclusion. “Evidently, educational practices were but one element of a larger cultural context that was supportive of inclusion” (Deppeler & Harvey, 2004, p. 157).

While there are many competent studies on how to make inclusion work, the evaluation of inclusion theory and practice “casts its net very wide, and sometimes seems to want to bring in a number of very different values and ideals – ‘equality’, ‘justice’, ‘fraternity’, ‘openness’” (Wilson, 2000, p. 301) and is therefore likely to remain inconclusive.

A small study (Cole, 2005) with six special educators who themselves had disabled children highlighted the difficulty of evaluating successful inclusion from the parents’ perspective. In this study, the consensus was that a vital component was the disabled child being made to feel welcome at the school and the need for all professionals to work with good faith and effort as “the notion that there are no easy answers, no package solutions to inclusion, can be a daunting one” (p. 341).

#### *Advantages of inclusive education*

Several advantages of inclusive education are noted by those schools where inclusion has been implemented. These are discussed in terms of students with disabilities, non-disabled students, teachers, the curriculum, and the school system.

##### *(a) Students with disabilities*

From a social perspective, children with disabilities can integrate in an inclusive setting, improving their social and communication skills, and they become more adept at relating to their non-disabled peers. This prepares them to function as adults in a largely non-disabled world (Vaughn & Schumm, 1995). When comparing disabled students in inclusive and exclusionary settings, it was found that there are increased positive peer interactions in inclusive settings (Bennett et al., 1997). Furthermore, teachers note that the stigma attached to being disabled is reduced, and the inclusive practice fosters personal achievement and self-realisation of the disabled (Vaughn & Schumm, 1995).

The consequences of educating students with disabilities in inclusive settings include positive effects for them specifically in reaching IEP goals (Bennett et

al., 1997). The findings of 14 studies all conclude that students with disabilities included in regular classrooms make greater progress academically and socially than peers in pull-out programmes or in traditional special school settings (Lipsky & Gartner, 1996).

Pedagogical practices enable classes and other learning groupings to work as caring, inclusive, and cohesive learning communities (Alton-Lee, 2003) to the benefit of all students.

(b) Non-disabled students

Non-disabled students, who have children with disabilities included in their class, become more confident about diversity (Vaughn & Schumm, 1995). This prepares them for citizenship in a modern world. In a study involving nine schools with 90 participants, including special and regular educators, administrators, and parents, a programme of change was implemented over three years through two Southern California school districts to promote inclusive practices (Burnstein et al., 2004). In this study it was found that benefits to non-disabled students were: improvement in school climate, children taking pride in assisting others, and students gaining a whole new set of social priorities.

From an instructional perspective, there is evidence that non-disabled students benefit when inclusive education is successfully implemented. Teaching practice improves: teachers tend to work more collaboratively and all students benefit when adaptations and accommodations can be accessed by all. Inclusion is not accomplished at the expense of the non-disabled peers (Hedeen & Ayres, 2002; Zigmond & Baker, 1996).

While concern is often expressed by teachers and parents of non-disabled children before experiencing inclusion, “those who are familiar with inclusion indicate that non-disabled students benefit from their relationships with individuals with disabilities” (Peltier, 1997, pp. 236-237). Research indicates, further, that the presence of a disabled student in the class had no negative

effect on the time actually used for instruction (Hollowood, Salisbury, Rainforth, & Palombaro, 1994).

(c) Teachers

In schools where there is successful inclusion, teacher ownership of the issues and their engagement in deeper, critical reflection improves efficacy and empowers teachers to engage in action research which results in improved practice and job satisfaction (Ainscow et al., 2004).

(d) Curriculum

Alton-Lee (2003) notes the following advantages when teaching caters for diversity:

- To facilitate learning, effective links are created between school and other cultural contexts in which students are socialised.
- Because of the diversity within each classroom, sufficient opportunity is provided for students to learn.
- Learning is cyclical, not linear, and multiple task contexts support these learning cycles.
- There is a coherent alignment between curriculum goals, resources including ICT usage, task design, and teaching.
- Students and teachers collaborate constructively in goal-oriented assessment.

Furthermore, Barton (1993) found that where there was successful inclusion, the curriculum is flexible and broad enough to encompass aims that respond to the needs and diversity of every individual student in a classroom. The holistic nature of inclusive education within a constructivist paradigm allows the curriculum to focus on three aspects to educational outcomes: learning outcomes, social outcomes and cultural outcomes. If academic content is inappropriate, teachers have the freedom to adapt, to focus on social and cultural outcomes as well as learning needs (Giangreco & Cravedi-Cheng, 1998). By changing response modes, developing functional equivalents, allowing different completion rates, allowing for different work loads, and

using computer assisted instruction, however, it is frequently possible to align the learning outcomes of disabled students with those of their non-disabled peers, which would ideally be the overarching aim (Nevin, 1998).

(e) School system

Maintaining two systems is unfair and inherently unequal. With a unitary, inclusive system, the inefficiencies of a dual system are obviated. There is no unnecessary duplication or expenditure on the classification of children to determine who belongs in which system. Within a unitary system, there is increased cooperative effort, and increased benefits of pooling expertise and resources. Artificial barriers are removed as it is acknowledged that it is a fallacy that there are two types of students, regular and special. It is possible to meet the unique needs of all students within a unified system, one that does not deny difference but celebrates it (W. Stainback et al., 1989).

Clearly, these are positives that are important to retain and duplicate.

### **2.2.6 Challenges with Inclusive Education Internationally**

Internationally, there are differing standards, activities and meanings that supposedly or genuinely represent inclusive education. It is not invariably and universally achieved (Ballard, 1999). Lessons learnt from the normalisation movement for people with intellectual disability and comparing this movement with the movement towards inclusive education, highlight some interesting aspects to explain some of the difficulties. "There was and is a philosophy–practice gap in normalisation that could easily be repeated in inclusion" (Culham & Nind, 2003, p. 75). Implementing inclusive education is not without its problems. These are discussed under the same headings as the advantages of inclusive education.

(a) Students with disabilities

People with intellectual disability are, at times, only accepted because of their attempts to conform and to be invisible (Rapley, Kiernan, & Antaki, 1998). The inclusion of this previously marginalised group can be considered to be subject

to their willingness “to change themselves to gain access to society rather than calling into question their exclusion in the first place” (Ferri & Gregg, 1998, p. 435).

Where the implementation of inclusive education has been reviewed and evaluated, findings suggest the need for continued research about meeting the needs of the disabled specifically within the parameters of inclusive education. In New Zealand, for example, which is a liberal democracy and where minority rights are protected, it seems that the disabled have, at times, not had their needs met in the wider definition of need. Hence a continuing initiative in New Zealand entitled “Building capabilities in special education” (Ministry of Education, 2003) which has seen \$5 million allocated over four years to investigate how best to meet the needs of the disabled in particular across various setting: special schools, satellite units, regular classrooms and in Māori schools. The New Zealand policy defines disability, as does the current study, as there being some form of physical or intellectual impairment. To accomplish the current New Zealand study there has been a move away from a barriers to learning approach towards identifying a specific population whose needs are not always being met within the implementation of the philosophy of inclusion (Ministry of Education, 1996). Indeed, in New Zealand there has been a further refinement in the type of information sought specifically assessing the needs of students, for example, with physical disabilities and those who fall within the Autism Spectrum Disorder. This indicates that the assumption that disability is a socially constructed problem, not an attribute of an individual (UN Enable, 2005) as the foundation for the development of inclusive education can sometimes result in those with disabilities not having their needs optimally met.

Within inclusive education, there is criticism of pull-out programmes because of the resultant lack of congruence in instruction in the programmes, loss of instructional time, and negative effects of labelling. Students with significant disabilities, however, require specially designed programmes. Zigmond’s (1995) study in the USA found that when these children were fully integrated,

this entitlement was not comprehensively honoured. The same point is raised in more recent research which queries to what extent the potentially positive practices of 'special' education are transferable to the inclusive model (Kauffman, McGee, & Brigham, 2004; Kavale & Forness, 2000).

(b) Non-disabled students

This leads to the consideration of non-disabled students who have a large part to play in the success or otherwise of inclusive education. Allan (1999) calls them the "inclusion gatekeepers" (p. 31) and investigates their responses to disability which she found to revolve around medical and charity discourses, rather than a rights discourse. She explains that these discourses encourage the regular students to take responsibility for the disabled students and to look after them. Depending on how this is done, it can be disempowering for the disabled, cause them to be seen as dependent, and consequently lead to their exclusion socially.

(c) Teachers

Teachers' beliefs about disability and inclusive education, discussed in detail earlier (2.2.4), can be barriers to successful inclusion. In a USA study, involving 84 teachers and 48 parents, who between them had 60 disabled children, it was found that teachers reported only a moderate level of confidence in their ability to implement inclusion and reported significantly less positive attitudes towards the concept of inclusion than did the parents. These authors found that teachers' general attitudes towards the notion of inclusion and their view of their personal skills and ability to access resources are strongly related to successful inclusion (Bennett et al., 1997).

(d) Curriculum

Foreman (1996) explains that while the ideal would be for disabled students to achieve similar outcomes to other students, it may be necessary to adapt the curriculum to make it more relevant and accessible to the student with a disability. Agreeing with this view, Perrin and Nirje (1985) hold that misconceptions about the term normalisation prevail. It does not mean making

people normal — the term then would be normalcy. It means, rather, accepting people with their handicap within normal society. This misconception can lead to inappropriate learning outcomes for disabled students, contributing to lack of success and diminished self-esteem. This links to teacher self-efficacy in that teachers may not see themselves as having the capacity to adapt the curriculum and consequently consider themselves and disabled students as having failed when the students do not achieve the same learning outcomes as their non-disabled peers.

(e) School system

To achieve inclusion it is necessary to dismantle the existing systems of regular education provision and special education as separate entities. Allan (2003) notes the “continued dominance of knowledge and practice by a rigid special education paradigm” (p. 176) as being destructive to the attainment of inclusive education in both Scotland and Queensland, Australia when those countries examined current educational practice.

Where inclusive education occurs successfully, schools are organised from the start with individual differences amongst students in mind. It is not adequate for schools to be structured as if all students of a given age were similar. Schools, which successfully achieve inclusive education, differentiate between students in order to give them equal access to common educational goals (Ashman & Elkins, 1995).

In the USA, the development of a unitary system that would promote inclusive education, proved difficult. The need to work from international to national to local cohesion in the vision of inclusive education has not always been accomplished. The political nature of inclusive education and the resultant responsibility of government to provide support has taken a while to reach fruition. There has been a breakdown in some instances, also because it was experimental at first and educators could not predict exactly what would work best and what sort of support they would need from government. It has proved difficult for there to be cohesion across both health and education services (Skrtic, 1991; Villa & Thousand, 1995).

Some countries have indeed managed to close almost all special schools as Mittler (2000) recounts is the case in Italy. In Australia, there is evidence of varied success in achieving inclusive education (Slee, 1995, 1996a, 1996b). There, at times, the “rhetorical commitment of education authorities and teachers’ industrial associations to inclusive schooling remains for many conditional and chimaerical” (Slee, 2001, p. 385). Agreeing with this view, Deppeler and Harvey (2004) note that while there is general support for the philosophy of inclusion, they found in Victoria, Australia, that “practice differs substantially from school to school and within schools from teacher to teacher” (p. 156). Culham and Nind (2003) concur, stating that schools and colleges “have been required to do little to respond to the needs and rights of people with intellectual disability and nothing major in terms of their systems and structures” (p. 70). The philosophy is appealing, the reality less so to many teachers.

Deep systemic changes are required if inclusive education is to be successful and leadership practices are central since a common goal and commitment to the goal are pivotal to successful inclusion. While this has been achieved in some instances in some countries, it has not been achieved universally if any of the crucial elements are missing (Ainscow, 2005).

Furthermore, as Datnow and Stringfield (2000) note in their synthesis of 16 longitudinal research projects across 219 schools in eight countries, even if educational reform is successful initially, several specific elements need to be present if the reform is to be sustained and improved student achievement is to continue. For example in one study they noted that “by the 3rd year of our 4-year study, only 7 of 13 schools were still continuing to implement their chosen reform designs” (p. 198). The crucial elements they noted were support at state and district level, as well as shared goals by all stakeholders, the goals being long-term and tied to a continuous focus on whole-school improvement, and policy systems being aligned. They also investigated failure by many schools to sustain reform and found that these schools “rarely focused on plausible goals, did not recruit [staff] aggressively or train purposefully, did not build formal and informal longitudinal databases on students’ progress” and teachers consequently tried to avoid new initiatives or “looked for ways to incorporate them as superficially as possible” (Datnow & Stringfield, 2000, p. 198). If school reform is

possible but problematic, it is understandable that the implementation of inclusive education has not been universally successful.

### **2.2.7 Discussion around Disparate Views**

There are two chief explanations for the problems that have sometimes been encountered in the implementation of inclusive education. While in some instances there has been a shift to the acceptance of total inclusion in education, there are those who have been rather more cautious about the dismantling of special education per se. Doyle (2003) identifies two main approaches to inclusive education

1. those with what she terms an “incrementalist” (p. 4) view, the cautious ones mentioned above, who favour a measured, step-by-step process of change leading to partial or full inclusion. These people see the individuals with needs as being the targets of change so that interventions can improve the environment and their access, thus lessening the need (Ashman & Elkins, 1995; Carnine, 1997; Croll & Moses, 2000; Hallahan & Kauffman, 2000; Hornby, 1999; Jenkinson, 1997; Kauffman, 1993; Kauffman et al., 2004; Kavale & Forness, 2000); and
2. those with a “reconceptualist” view who reconceptualise disability and “see the target of change as the social construction of disability” (Doyle, 2003, p. 4). This perspective focuses on society’s need to behave morally and ethically thus ensuring inclusion of the disabled as of right, and providing the moral imperative to identify barriers to learning and to effect change so that these barriers are removed (Ainscow, 2005; Booth & Ainscow, 2002, 1998; Griffiths, 1998; Kenworthy & Whittaker, 2000; Lipsky & Gartner, 1996; Low, 1997; Mittler, 2000; Sindelar, 1995; Slee, 1996a, 2000).

While the authors supporting both views honour the ideal of the right of all students to have their needs met, they diverge in the way they consider as optimal for this to occur. Those maintaining a reconceptualist view, further, blame the proponents of an incrementalist view for the shortcomings of inclusive education. Slee (2001), in

promoting the notion of democratic schools where minority rights, such as disability, are recognised, argues that these democratic schools “represent new social settlements that liberate us from the yoke of the fortresses buttressed by traditional special educational thinking and practice” (pp. 385-386). The emotive terms he uses to describe those supporting an incrementalist view reflect the level of passion and frustration there is in the field. He holds that the incrementalists’ assumption that the individual needs be targeted, which may or may not lead to inclusion in regular classrooms, perpetuates exclusionary practices which are anathema to those supporting a reconceptualist view.

On the other hand, those supporting the incrementalist view hold those supporting the reconceptualist view accountable for the failure of the inclusive system to meet the needs of many disabled students. Kauffman et al. (2004) maintain that “special education has increasingly been losing its way in the single-minded pursuit of full inclusion” (p. 613). These authors maintain that the full-inclusion movement has achieved some laudable outcomes, such as eliminating the placement of students in special education for whom this was not necessary. They hold, however, that the movement has had some negative outcomes, notably that special education has come to be seen as “a second-class and discriminatory system that does more harm than good” (p. 616). These authors, furthermore, note that including all students in regular education has worked counterproductively for some students. It has resulted in these students being exempt from performance standards because of inappropriate accommodations, thereby lowering the students’ ultimate achievement. They argue that “special education’s purpose was to bring the performance of students with disabilities closer to that of their non-disabled peers in regular classrooms, to move as many students as possible into mainstream with appropriate support” (p. 613). Kauffman (2003) maintains that disabled students need to be equipped with skills, and that having these skills is “like being appropriately dressed” (p. 195), and he posits that at times there is insufficient direct instruction appropriate to the needs of disabled students in regular classrooms.

Supporters of the incrementalist view see the broader goal of education as preparing disabled students for success in society, using whatever means are most appropriate to

their needs, where they see “the primacy of meeting children’s individual needs as overriding an ideological commitment to inclusionist ideals” (Croll & Moses, 2000, p. 1). They hold that the regular classroom is not always the best means, nor is it necessarily the least restrictive environment (Kauffman & Pullen, 1996). This is in contrast to the reconceptualist view which is that the regular classroom is the only place where it is possible for all students to experience equitable treatment. The incrementalists argue that disabled students may “require special education and related services if they are to realize their full human potential” (Hallahan & Kauffman, 2000, p. 7). They posit that the denial of disability by reconceptualists, expressed often in rejecting labels attributed to students, does not further the development of students as it incapacitates educators in their endeavour to provide appropriate teaching. Needs can be diverse and they can change over time. As Kauffman (1989) asks, how would handicapped parking work without a label for the space and the person permitted to use it?

Waterhouse and Virgona (2005), in their analysis of ten disabled people who have been successful, summarise potential advantages and disadvantages of labels:

On the one hand, they may promote prejudicial judgements, serving to relegate people into pigeon holes in life by defining them in terms of their disability. On the other hand, such diagnoses can provide, in some cases, a platform for the development of ‘alternative’ strategies, building on capabilities and a positive orientation to life and learning. The label may serve to liberate and to empower. Having identified and accepted that there is a disability, new strategies and resources can be brought to bear to provide support for individuals. Such approaches can lift an intolerable burden of expectations. (Waterhouse & Virgona, 2005, p. 5)

The disadvantages of labelling expressed here are the justification the reconceptualists use to reject their use and the advantages are used by incrementalists to support the continued use of labelling and the provision of specific necessary supports that individuals so labelled may require.

### **2.2.8 Conclusion**

This section of the background to the study provided an overview of inclusive education internationally, explaining the underpinning rights-based philosophy. It

enumerated the key elements that must necessarily be present if inclusive education is to be successfully accomplished, and it highlighted the challenges that exist to inclusive education. It is necessary that this foundation be laid for the current study as the African National Congress's (ANC) professed aim is to develop an inclusive education system in South Africa. It is necessary to have an overview of inclusive education in other settings before it is possible to discuss inclusive education in the specific setting of KZN in South Africa.

### **2.2.9 Links to Current Study**

It is evident that while the pendulum has swung towards the ideal of inclusion internationally and great strides have been taken to address inequities for the disabled in the education arena, inclusive education has proven conceptually and practically problematic.

It seems that there is no single blueprint for inclusive education and that each school and situation needs flexibility in the assessment of practical implications if the aspirations of all are to be realised and teachers are to be successful in meeting the needs in the inclusive model. The reconceptualist view of inclusion proposes a social construction of disability which ensures inclusion of the disabled as of right, providing the moral imperative to identify barriers to learning and to effect change so that these barriers are removed. The incrementalist view favours a measured, step-by-step process of change leading to inclusion where individuals with needs are the targets of change so that interventions can improve the environment and their access, thus lessening the need. Proponents of both these views are equally vehement, and they are inclined to see proponents of the opposing view as inhibiting the most effective process for meeting the needs of disabled students.

In the current study a moderate integrationist stance is adopted in relation to the enormous body of literature on inclusive education. When considering the implementation of inclusive education, all parties were considered to have useful and

valid points to offer and their issues, concerns, approaches and views will be addressed.

Pivotal to the current study is the philosophy that underpins South African policy regarding students with disabilities and whether it reflects a reconceptualist or an incrementalist approach to inclusive education. In this context, the adoption of inclusive education in the developing world context was considered, with the consequent experiences of those participants in meeting the educational needs of disabled students. The extent to which policy ideals are realised in practice was also evaluated, and similarities or differences compared with the experiences of other countries were analysed.

Some key elements from this section of the background to the study, which carry forward to the current research, fall into three categories: teacher issues, parent and child issues, and resource issues.

### *Teacher issues*

From the literature (Deppeler & Harvey, 2004; Mittler, 2000; Slee, 1995, 1996b), it is evident that teacher beliefs about inclusion profoundly affect the degree to which inclusive education can successfully be implemented. Rights issues and the empowerment construct are fundamental to all legislation in South Africa subsequent to democracy but it is not possible to legislate changes in beliefs and values. In the current study, therefore, teacher beliefs about their own competency are explored and how these potentially affected morale and their willingness to accommodate students with disabilities in an inclusive setting. Their beliefs are broached about disability and the optimal placement, in their view, of children with disabilities.

From the literature (Lipsky & Gartner, 1998; Mittler, 1995; Smith & Smith, 2000) it is, furthermore, evident that key components need to be present if inclusive education is to be achieved. Some of these are that:

- class sizes need to be reduced if disabled students are to be successfully included,
- planning and preparation time need to be provided, and

- specific pre-service and in-service teacher education is necessary.

The effectiveness of supports such as these are explored with teacher participants in the current study.

The literature presents a picture of whole school change supporting teachers to change practice changes to meet diverse needs, thereby meeting the educational needs of all students. The current study investigated how educators have responded to the call to change practice, and whether they have been provided with the necessary supports.

### *Child and parent issues*

The literature provides evidence that where inclusive education is successfully achieved, advantages accrue to disabled students in that their social and cultural needs can be met as well as their learning needs are met (Giangreco & Cravedi-Cheng, 1998; Hedeem & Ayres, 2002). The current study, therefore, investigates to what extent participants have been able to access inclusive education, whether they want to, and what advantages they perceive in the educational provision they have chosen.

Since placement in special or regular schools is dependent on parents being able to afford such education, participants' experiences, across a variety of settings, are investigated. The non-disabled gatekeepers are also considered, as peer beliefs and practices appear to be an important factor in determining the success of inclusive education.

### *Resource issues*

If inclusive education is to be successful, it requires appropriate funding (Bennett et al., 1997; Deppeler & Harvey, 2004; Lipsky & Gartner, 1998; Mittler, 1995; Slavin & Madden, 2000). Implementation of policy will differ depending on whether an incrementalist or a reconceptualist model is being followed in KZN, but resourcing will have a direct bearing on outcomes for the disabled in either model. In the drive to achieve inclusive education, in-service upskilling of teachers has been shown to be important and the current study explores the extent to which this costly undertaking has been able to be achieved, while taking into account the financial constraints of the

ANC (to be discussed below). Adaptations to environment are also costly, as is the provision of supports for students with disabilities in regular classrooms. With the many other issues draining the government coffers, the question of whether inclusive education is being sufficiently funded, thus setting it up for success, is considered.

The next section of the background to the study addresses the theme of democratisation in South Africa and the impact this has had on educational policy and practice.

## **2.3 Democratisation in South Africa**

### **2.3.1 Introduction**

The next section of the background to the study places the current study in its political context. Evaluation of inclusive education in liberal democracies, such as England, Australia, Europe and the United States of America, is ongoing, as discussed in the section on inclusive education. This study is distinct in that the context is different, and much of the difference is a reflection of the political situation.

Democracy, which is taken for granted in most developed countries, is new in South Africa. How far South Africa has progressed towards its professed aim of achieving liberal democracy status has influenced all policy including education, special education, inclusive education, and welfare policy, all of which have an indirect influence on the children at the centre of the study: those with disabilities. It is therefore necessary to investigate the prelude to democracy in South Africa and the journey thereafter in order to understand the specific challenges a developing country and a new democracy faces with the implementation of an educational reform such as inclusive education.

### 2.3.2 Colonialism, Cultural Imperialism, Postcolonialism: from Past to Present

When applied to South Africa, the topics of culture, colonialism, and imperialism need to be explored as the impact of colonial imperialism and an understanding of that impact is fundamental to the interpretation of any data emanating from the research. Also, there is an historical politically-influential set of impacts on education and special education.

As pointed out by Tomlinson (1991) the term *cultural imperialism* gained popularity in the 1960s and has several definitions. No single definition would be able to encapsulate every sense in which the term is used in the literature, but it is useful to compare and contrast a few to avoid misinterpretation. Mattelart and Siegelau (1979) agree, saying that the generic concept of cultural imperialism “has too often been used with ill-defined meaning” (p. 57). A definition with which one could start is put forward by Bullock and Stallybrass for whom cultural imperialism is the “...use of political and economic power to exalt and spread the values and habits of a foreign culture at the expense of a native culture” (Bullock & Stallybrass, 1977, p. 303).

One might argue that this is too limiting a definition as it presupposes the intention to impose directly. Nor does it allow for the conscious power of the indigenous people to discern, appraise, analyse and accept or reject the values of the dominating culture. And, indeed, one can argue that the word *culture* is “one of the two or three most complicated words in the English language” (Williams, 1983, p. 160). Definitions of culture abound — possibly because there is some confusion as to its meaning, or as Tomlinson (1991) suggests, because culture is so huge and all-encompassing a notion that it can embrace the many definitions, each perhaps identifying or highlighting some pertinent aspect of the whole. For the purposes of this thesis, a suitable definition incorporates the idea that culture is a “complex whole that includes knowledge, belief, art, law, custom, ...and habits acquired by man [*sic*] as a member of society” (Tylor as cited in J. Tomlinson, 1991).

Tomlinson (1991) cites Williams (1983) who identifies two strands to the concept of *imperialism*:

- the colonialism of the 19<sup>th</sup> century which had primarily a political focus and which has its roots in English colonial rule, and
- the economic imperialism identified in 20<sup>th</sup> century Marxist philosophy on the stages of capitalism.

R.J.C. Young (2001) differentiates by explaining colonialism as referring to British domination and imperialism as referring to Roman, Ottoman, Spanish and European domination. He notes that often the two terms are used synonymously. Whilst he would like to see philosophical differences between the terms he admits that for many authors the terms have blurred, especially as the British started to use the term *imperialism* to refer to those British citizens who had settled in the colonies. Said (1994), for example, makes no distinction between the two terms. What is important is that within the schema of anyone using the terms resides the notion of subjugation. In this thesis, the term *cultural imperialism* refers to the concept of empire and the connotations inherent therein, which could be substituted with the word *colonial* since Britain did, indeed, colonise South Africa whilst expanding its empire. The Dutch, while the first White settlers of South Africa, did not colonise it in the same way that the British did. The first Dutch settlers, in the mid 1600s, farmed areas of the Cape Province to provide produce and stock for the ships that were plying back and forth to India where the wealth was. They did not set out to colonise or rule South Africa and when England overcame the Dutch in the 18<sup>th</sup> century, the English took over all the Dutch colonies including South Africa. Tension often ran high between Afrikaner (descendents of these Dutch settlers) and the English who were the British colonisers — this tension culminating in the Boer war from 1899-1902. From the perspective of the indigenous peoples of South Africa, however, it was the British who were seen as the initial colonisers. Subsumed within the concept of subjugation within colonisation, in the current study, is that the values and beliefs of the Whites were promoted at the expense of indigenous knowledge, values and beliefs.

Other terms used in the subjugation context are *third world* and *developing world*. According to R.J.C. Young (2001), these terms have slowly become “associated with

poverty, debt, famine and conflict" (p. 4) and he maintains it is preferable to stipulate the exact geographic location being discussed. Since the focus of this thesis is KZN in South Africa, this is indeed easier.

Within the South African context, then, the first of Williams's (1983) strands mentioned above, that of political domination, had the greatest impact as the majority was subjugated and disenfranchised by the colonists. The second, however, that of economic imperialism, factored in almost by default as time went by.

In order to understand colonialism and its effect on South Africa, it is necessary to explain it in terms of the reality for the people then — both imperialists and indigenous people. Gellner (1993) argues that the domination of most of the world by the West is best explained in economic terms, because of the West's technological and scientific dominance. R.J.C. Young (2001) disagrees, interpreting Gellner's viewpoint in terms of modernity which, he says, is "too convenient a deflection" (p. 5). He points out that political liberation does not necessarily give rise to economic liberation, as it would were Gellner's supposition correct. No. Colonialism, according to R.J.C. Young (2001) had as a fundamental assumption the belief that it benefited the nations brought under its power. To their mind it was thus morally justified.

Said (1994), however, notes that imperialism always met resistance, and that despite that resistance the colonising attitudes gradually and systematically subjugated the indigenous people. The colonising mind saw the indigenous people as "them", distinct and different from "us", inferior and deserving to be ruled. The indigenous people understandably resisted where they were able. This was indeed true of Britain's colonisation of South Africa. R.J.C. Young (2001) agrees that "most of those subjugated to colonialism resisted from the first moment" (p. 163). As a result, national liberation movements go back to the beginning of colonialism itself; indeed "Western imperialism and Third World nationalism feed off each other" (Said, 1994, p. xxvii). This was the case in South Africa where the ANC gained enormous support though it became increasingly *gagged*. This seemingly informal term is deliberately used as the then government issued "gagging orders" to limit the freedom of expression in some of the press (Sparks, 2003).

The Blacks were disenfranchised at that time and the ANC therefore not considered a legitimate political party<sup>1</sup>. When the ANC and other resistance movements were banned, the indigenous people had limited voice. This was restricted almost entirely to Black and some English language press which, in turn, wielded increasing power and were frequently fined and later banned by the Nationalist Government (Sparks, 2003) which was trying to quell any opposition.

*Neocolonialism* is the term coined after World War II when the domination exercised by imperial powers was unable to be sustained. The Soviet Union actively supported the colonised people in Africa, as did Cuba and China. Being able to express their disenchantment with colonialism and with the imperial powers being exhausted by the war, colonised nations were, in many cases, able to achieve national liberation. The new superpower, the United States of America, also supported some of the liberation movements for economic reasons. It saw “the colonial trading blocs as a barrier to its own economic expansion” (R. J. C. Young, 2001, p. 44). In many countries subjugation was ended, but it is a gloomy and discouraging fact that the emergence of nationalism in post-colonial states does “not always make up a flattering story” (Said, 1994, p. xxvii).

Here South Africa diverges from other developing nations which gained national independence at that time. A mere three years after the Second World War ended and while the world still reeled as the horrors of the Nazi regime sank in and people tried to make sense of its inhumanity, the Whites in South Africa voted in the Nationalist government. This government legalised, and entrenched in policy documents, previously unwritten colonial domination. The apartheid regime was born. Under apartheid, subjugation was ratcheted up a notch or two, the ANC and other liberation organisations were galvanised into greater resistance, and the government sought and gained independence from Britain, becoming a republic.

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<sup>1</sup> Up until 1994, only Whites were permitted to vote in South Africa. The Blacks, Indians, and Coloureds in South Africa were not permitted to vote. They were completely disenfranchised and Nationalist Government hoped that they would consequently be politically disempowered. When people in South Africa talk of “the struggle”, everyone understands that it was the struggle to achieve political freedom.

The liberation organisations may have been gagged and banned, but they were not inactive despite persecution and incarceration without trial. Various factors finally forced the Nationalist Government to start along the road to democracy. Factors which encouraged this decision were:

- pressure from the United Nations,
- sanctions which impacted on the economy,
- the world's condemnation evidenced by their refusal to engage in sporting ties with South Africa, and
- increasingly violent resistance within its borders, especially in the townships.

In 1990 Nelson Mandela, the president of the ANC, was released after 27 years in jail and in 1994 the first free and fair elections were held in South Africa. The Postcolonial age dawned, and with it democracy.

### **2.3.3. Democracy**

Worldwide there appeared in the 1990s what is termed the *third wave* of democratisation which came in the wake of the demise of communism in 1989. Two earlier periods of democratisation had occurred, one in the nineteenth century and one just after the Second World War. This third wave's distinguishing features were that democracy had become a global aspiration with formal structures for accountability, and that it embraced the movement towards investing citizenship with meaning (Grugel, 2002).

But what is the meaning of democratisation? Initial studies in the 1970s and 1980s, assumed that the meaning of democratisation was simply the transformation of the current unrepresentational political system to one where there was a representative government. According to Grugel (2002) the "basic minimalist definition sees democratization as the regular holding of clean elections and the introduction of basic norms ... that make free elections possible" (p. 5). Other authors maintain that democratisation is a continuous process that has fragility as one of its main

characteristics (Daniel, 2000; Diamond, 2000; Guelke, 2001; Huntington, 1991; Pastor, 2000; Rapoport & Weinberg, 2001a; Soares, 2000) because a broader definition, that of a liberal democracy, also requires the introduction of liberal individual rights (Karvonen & Anckar, 2002). It had become apparent that while some democracies flourished, others became only partial democracies, or problematic democracies (Grugel, 2002).

Huntington (2000) argues that it is not desirable to extend democratic elections to non-Western societies as it could strengthen anti-Western elements. He maintains the liberal democracy's focus on individual rights and rule of law is incompatible with non-Western societies which favour hierarchy. Certainly the number of dictatorships emerging with the demise of colonialism would support this view (Said, 1994; R. J. C. Young, 2001). Pastor (2000) agrees that establishing a liberal democracy can be problematic, but he supports the idea of setting up electoral democracy as a first step upon which democratic deepening can take place as peace can be secured and political leaders feel the constraint of the people's opinions. Daniel (2000) counters Huntington's argument by highlighting the universality of certain universal minima in all civilisations and religions and holding that the principles of democracy are desirable to all. This universality, he maintains, makes democracy threatening to the elites within non-democratic regimes who stand to lose their power.

There is no single model of democratic rule (Stepan, 2000) as different emphases will be found in different circumstances. Democratisation efforts are multi-faceted and fragile, needing negotiated, peaceful transitions to democracy, and the addressing of economic and social inequalities (Plattner & Espada, 2000).

Traditional theories of democracy highlight the importance "either of national structures or national actors in producing the conditions for the emergence of democracy" (Grugel, 2002, p. 239). This would certainly be partly the case in South Africa where the main obstacle to democratisation since the 1950s was not, as in other African countries, the poverty, debt, famine and conflict identified by R.J.C. Young (2001). Rather it was the institutionalisation of racism and apartheid. There was increasing opposition to apartheid, and although the state responded with violence and terror, the national actors (for example the ANC and parties politically left of the

ANC like the Pan-Africanist Congress) were unquelled. For Huntington (1991), the development of a middle-class of professionals is key to democratisation and he sees capitalism as leading to the development of such a class. So, in terms of the structures inherent in traditional theories of democratisation, South Africa would fit that profile well.

There are three useful theories of democratisation which provide a good platform to further this discussion:

- modernisation theory
- historical sociology
- transition theory (Grugel, 2002).

### *Modernisation theory*

Modernisation theory links globalisation to democratisation, positing a relationship between the spread of democracy and the universality of progress (Giddens, 1990). Progress and globalisation are, in turn, intertwined with capitalism (Lipset, 1959; Rostow, 1960). Indeed, many democracies have developed in the modern world under capitalism. According to Lipset (1959) capitalism is vital to democratisation because it allows an educated middle class and produces wealth, thereby diminishing class conflict.

The limitations of this theory are centred around an over-simplified relationship between capitalism and democracy (Grugel, 2002). It does not recognise that it is well-nigh impossible for one society to copy and replicate what occurred at a different time in a different society. Indeed, O'Donnell (1973) argues that with the strengthening of capitalism in new democracies, dictatorships seem to develop more readily than democracy.

More recently modernisation theory has been restated by Leftwich (1996) who sees it applying to developing states only. He maintains that if there is economic development, whether or not it starts off in a democratic setting, it will lead to democracy in the end. Diamond (1999) has been instrumental in updating modernity theory, focussing on the role of civil society and civic freedom if democracy is to be

consolidated. It does not, however, explain why there is so frequently only partial democracy (Grugel, 2002).

### *Historical sociology*

Historical sociology is also sometimes termed *structuralism* and has an interest in explaining phenomena and outcomes, not predicting them. This theory focuses on the relationship between the state, which governs, and classes which shape the eventual political structure (Skocpol, 1985). It provides a comparison across time and explains the role of such factors as the economy and class in democratisation and in determining whether a consolidated democracy or a dictatorship will develop (Grugel, 2002).

Moore (1966) identified three routes to modernity. He termed them:

- *Bourgeois Revolution* such as occurred in Britain, the United States, and France when the number of peasants diminished thus ending their dependence on the landed gentry, and when those wielding power focussed more on commercial and industrial interests.
- *Revolution from Above* such as occurred in Japan and Germany where the force of capitalism and the desire to avoid violent social change gave rise to militarism and later fascism.
- *Revolution from Below* such as occurred in Russia and China where the path to modernity was through revolution of the peasants.

In structuralism the importance of the working class in the progress towards democracy is highlighted. "The organized working class appeared everywhere as a key actor in the development of full democracy" (Rueschmeyer, Stephens, & Stephens, 1992, p. 270). Conflict is to be expected and can be considered normal, as capitalist societies have divisions of class, and inherent in these divisions is antagonism between classes.

Critics of structuralism query its focus on long-term historical change and therefore its inability to explain the development of sudden democracies in East and Central Europe (Grugel, 2002). While there has been a trend recently towards more agency-

driven theories of democracy, historical sociology provides a useful framework for the analysis of global structures, economic conditions, and social forces that impact on democratisation (Haggard & Kaufman, 1997 cited in Grugel, 2002).

### *Transition theory*

Transition theory is also sometimes termed the 'agency approach'. It criticises modernisationists and structuralists as attributing too much consequence to the economy, history, and development in determining political outcomes. Instead it is suggested that democracy can be created independently of the structural context (Grugel, 2002).

Proponents of transition theory hold that modernisationists and structuralists would not expect democracy as perceived by the West to be reproduced elsewhere as they would maintain that sufficient levels of development have not been attained or that unfavourable social structures would work against the establishment of democracy. Those viewing democracy from an agency perspective maintain it can be and has been achieved in environments where modernisationists and structuralists would have had a pessimistic view of its potential success. Examples of this in Africa would be Malawi and Botswana which have achieved democracy within tribal systems.

The roots of transition theory are found in Rustow's (1970) suggestion that the only prerequisite for democracy is a national unified state: "the vast majority of citizens in a democracy-to-be must have no doubt or mental reservations as to which political community they belong to" (Rustow, 1970, p. 350). The creation of democracy is then a dynamic process which moves through three stages: liberalisation, transition, and consolidation (Grugel, 2002). Democratisation is thus seen as a process where the actors have changing roles to play. Transition studies highlight the importance of the elites in the process of democratisation who were in an advantaged situation prior to democratisation and who stand to lose the most. Schmitz and Sell (1999) explain as follows:

The regime elite is most likely to split into hard- and soft-liners along two basic alternatives, either to suppress the opposition or to regain legitimacy by using a strategy of liberalization. Successful transition is most likely when soft-liners

ally with the opposition and are transformed in the process into reformers. (pp. 31-32)

### **2.3.4 South Africa and Theories of Democratisation**

If one looks at the journey in South Africa to democracy and beyond, certain factors and elements can be explained in terms of all three of the above theories of democratisation. The one with which it fits most closely is transition theory.

#### ***South Africa and modernisation theory***

In terms of modernisation theory certainly South Africa was a developing nation and like many countries, affected by globalisation. The capitalist economy in South Africa was faltering with economic sanctions being imposed by United Nations member states. This led to the realisation amongst the elites that there was no alternative to accepting democracy if the Whites wanted to retain the country's wealth, other than isolationist policies which would lead to poverty for everyone. Younis (2000) argues that the success of the national struggle of the Blacks in South Africa was due to the fact that the White dominated economy was dependent on Black labour. This view is supported by Heribert, Slabbert, and Moodley (1998), who hold that the ruthlessness of apartheid was limited and its ability to reform itself was due to the minority's complete dependence on the indigenous people for labour.

Certainly, ideology is difficult to promote and sustain without the funds to do so, and a stable economy is therefore vital. Herbst (2001) points out that "most organizations in most African countries lack the resources, including the access to telecommunications, computers, published materials, and trained staff, that would allow them to participate in daily debates" (p. 362). While this is true of the rural areas in South Africa, there is developed world infrastructure in most cities, although this is not accessible to the burgeoning masses of squatters that surround the cities. Glaser (2001) maintains that the outlook in South Africa is nevertheless brighter because there is a large organised working class which, "though largely [W]hite is in the process of becoming multiracialized" (p. 220), which, he holds, is significant in the sustaining of democratic institutions. Capitalism, driven by globalisation, has indeed impacted on events in

South Africa, ensuring that it qualifies as democratic at least in the political sphere, even though White dominance continues in the economic arena (Younis, 2000).

### *South Africa and historical sociology*

Seen within an historical sociology framework the importance of the working class was paramount in the lead-up to democracy. The ANC organised strikes through their cell block structure in the townships. Because there was no freedom of the press in the 1980s, a member of the ANC in each block would filter the date of the strike down to the next block. Since business was reliant on the labour force, these strikes had the ability to cripple the economy. The range of available forms of resistance was expanded, allowing non-violent strikes and boycotts as well as violent terrorist activities.

In the townships there was the violence and unrest that would be expected by structuralists and the achievement of democracy would be explained in terms of revolution from below (Moore, 1966). Reasons for the violence were many and varied. Rapoport and Weinberg (2001b) argue that elections invite contentious behaviour because they act as “ succession moments” (p. 21) and this contentious behaviour can easily escalate into violence. When there is the frequent reality of violence, sometimes just the threat of violence can influence electoral behaviour (Guelke, 2001) which appears to have been the case in some areas in South Africa prior to the first elections (Sparks, 2003). There was much intimidation of Zulus in KZN by Mkonte we Sizwe, the military wing of the ANC.

Some of the violence was ethnic in origin. On the gold mines, in the 1970s and 1980s, there were frequent ethnically-based eruptions of violence (Cobbett & Cohen, 1988; McNamara, 1985). Some authors, though, remind us that we should challenge common assumptions that all war in Africa is attributable solely to ethnicity (Braathen, Boas, & Saether, 2000). They maintain that this is too simplistic an interpretation fostered by the West’s blinkered view that encourages stereotypical images of primitive Africa beset always by tribal wars. They suggest that violence cannot be reduced to just one factor and that there are, in reality, complex and interactive causes of violence.

Post-settlement violence which continues in South Africa shaped by the long civil war, a militarised society, and weak state institutions for controlling violence, would also be expected within the theory of historical sociology. There has been continued poverty and in some areas worsening economic deprivation which has also contributed to the continuation and reinforcement of the culture of violence (P. Du Toit, 2001). Henrard (2000) suggests that until there is protection of minority rights, there will inevitably be violence. She proposes two ways in which minority rights can be protected: non-discrimination, and the protection of difference. The elimination of discrimination in legislation was one of the first priorities of the new ANC-led government in 1994. It is not, however, possible to legislate what people's beliefs must be and the process of elimination of discrimination is ongoing in South Africa. There are still regularly reported instances of racial discrimination, and discrimination against groups such as women or the disabled. Ongoing discrimination against the disabled in some quarters has influenced the findings in the current research.

All legislation subsequent to apartheid has had a strong social justice foundation in the quest for a society where minority groups and difference are not only protected but valued as well. This, too, is taking time to accomplish as all citizens settle into the new democracy and establish what it means in reality for them. At least the structures and legislation now exist for the protection of difference, even if this is not achieved at all times as yet.

### *South Africa and transition theory*

Most aspects of democratisation in South Africa are, however, best explained by transition theory. The Blacks in South Africa who made up the vast majority had "no doubt or mental reservations as to which political community [they belonged]" (Rustow, 1970, p. 350). There was widespread support for the ANC and the people rallied joyously to their calls for demonstrations demanding democracy. The regime elite, the Whites governed by the Nationalist Government, did indeed divide into two groups: the hard- and soft-liners (Schmitz & Sell, 1999). The hard-liners tried first to suppress the unrest by implementing more and more draconian measures. Police brutality was common, a famous example of which was the murder of activist Steve Biko. Such was the stranglehold of the government on the press that while the Biko

murder received huge media coverage world-wide, little mention was made of it in the South African press. The law allowed the incarceration of prisoners without trial first for 90 days and then later this was increased to 180 days. As unrest in the townships escalated the government declared a state of emergency until the riots were quelled by force. Laws banning the gathering of people in groups of more than ten were passed to try and stop political rallies.

When it became apparent that the hard-liners were not gaining ground, the soft-liners, under the leadership of then President de Klerk, agreed to broker peace “by using a strategy of liberalization” (Schmitz & Sell, 1999, p. 31). The most famous icon of liberalisation must surely be the release of political prisoner Nelson Mandela in 1990. In the years leading up to the first free and fair elections in 1994, the ruling regime formed several pacts with the ANC as it was clear right from the outset that they would be the ruling party after the elections. This was indeed the case with the ANC winning a 62% majority in 1994, a majority they increased in the two following elections. They won 67% of the votes in 1999 and 69% in 2004. Seen within transition theory, South Africa has moved through the liberalisation and transition stages identified by Rustow (1970), and time will tell whether the consolidation phase has been achieved.

### *The role of parties in consolidation of democracy*

The notion that transition as well as consolidation processes are commonly defined by uncertainty was introduced by O'Donnell and Schmitter (1986) and embraced by later authors. Transition is conceived by Bratton and van der Walle (1997) as “an interval of intense uncertainty” (p. 10). Schedler (2001) talks of the “blurred boundaries of democratic transition and consolidation” (p. 1). He goes on to highlight the differing perspectives of those who study democracy from within the transitional regime and those who study it from without. He maintains that those with internal interests are more likely to take actor perceptions more seriously, and interpret their agency differently from those who have an external perspective. What adds to the *blurred* nature of the boundaries is that studies are made of actors' current beliefs about the future, and these are not completely stable as they may change their beliefs as their roles change. Schedler (2001) concludes that since these events are continuous, it is not

inept analysis or description that make it difficult to delineate when exactly transition ends and consolidation is effected. It is preferable to accept the “structural fuzziness of transition and consolidation” (Schedler, 2001, p. 18).

If the boundaries between transition and consolidation are blurred, how can we tell if a country has achieved consolidated democracy? Randall and Svasand (2002) note that an assessment which looks solely at whether the country “has experienced two successive and peaceful transfers of power” (p. 2) to determine whether that country has achieved democratic consolidation is too simplistic. They prefer a wider evaluation which acknowledges the complexity of democratic consolidation including aspects such as “no significant actors attempt to use non-democratic means to obtain their goal” (p. 2). Linz and Stepan (1997) developed a widely adopted definition which states that consolidated democracy assumes “a political regime in which democracy as a complex system of institutions, rules and patterned incentives has become ... ‘the only game in town’” (p. 15).

It seems that political parties are indispensable in democratic consolidation (Lipset, 2000). Even though they may not be part of the definition, a multi-party system is a corollary of the consolidation process. Indeed, Clapham (1993) maintains that a key indicator is “the capacity to develop a party system which is both integrative between different communities and competitive between different parties” (p. 437). There must be “mechanisms that go to balance and limit majority rule...in order for democracy not to deteriorate into the tyranny of the majority” (Karvonen & Anckar, 2002, pp. 12-13). The need for adequate political opposition to the ruling party is best obtained if there is at least one other dominant party to stand in opposition. Otherwise, if there is “a high level of party fragmentation” (Randall & Svasand, 2002, p. 8) there is unlikely to be effective or substantive opposition.

### **2.3.5 Democracy in South Africa**

What is the situation in South Africa? A report by South African Web (2004) shows that in the general elections in 2004 the ANC attracted 69.68% of the vote. The next most

popular party was the Democratic Alliance which drew 12.37% of the vote. Third was the Inkatha Freedom Party, achieving 6.97%.

Compared with past elections, it is clear that the ANC has achieved a steady increase in support. Opposition parties have declined commensurately. In 1994, the strongest opposition was the National Party with 20.4%, but this fell in 1999 to 6.9% when it had reconstituted itself as the New National Party, and this decline continued in 2004 to 1.65%. A similar decline is evident for the third most popular party in 1994, the Inkatha Freedom Party which was largely supported by the Zulus in KZN, which then gained 10.5%, falling to 8.6% in 1999 and to 6.97% in 2004. The only party to increase its share of the votes is the Democratic Party which started with 1.7% of the vote in 1994, increasing this to 9.6% in 1999 and again, having reconstituted itself as the Democratic Alliance, to 12.37% in 2004, thus becoming the strongest opposition to the ANC at the moment.

Political analysts have varying explanations for the lack of strong opposition to the ANC giving rise to the problem of one-party domination which may work counter to the consolidation of democracy.

- Some see it as a need within the voters to give expression to their desire for independence and liberation by voting for the ruling ANC party which brought about their liberation (Giliomee, 1994; Johnson, 1996; Southall, 1994).
- Disillusionment among supporters of minority parties at their lack of political impact has prompted them to change allegiance to the major party or to withhold their vote altogether (Schlemmer, 1998).
- It is possible that there could be a spiral of electoral domination because current ANC supporters wish to maintain government patronage, and opposition supporters may wish to gain it (Schlemmer, 1998).
- Another explanation for the lack of a strong opposition is the lack of experience on the part of the voters with multi-party democracy and a feeling of comfort with an hierarchical structure which one-party dominance provides (Huntington, 2000).
- Yet others explain it as a desire to show solidarity with a party that represents their ethnicity (Giliomee, 1994; Schlemmer, 1994).

Countering these perspectives Mattes and Piombo (2001) hold that support for the ANC can be explained by positive ratings on the part of voters of its performance in government. They do, however, agree with Schlemmer (1998) that those voters who are not satisfied with the governance of the ANC “do not see a legitimate alternative among the existing opposition parties” (Mattes & Piombo, 2001, p. 101). This view is supported by Jung (2000) who points out that people have several identities: racial, religious, familial, ideological, and class. What is important is which identity is focal in a given situation. She holds that in the first election the voters’ ethnicity may have been politically relevant and a factor in where they decided to cast their vote. In subsequent elections she maintains that it is more likely to be their assessment of the governance that influences their vote.

Other authors, however, maintain that a strong, dominant party might play a positive role in the ultimate development of democracy: “While electoral rotation may be a useful spur to party responsiveness in mature Western democracies, ... it is a moot point how much vigorous demagogic inter-party competition a fragile, emerging and unconsolidated democracy can bear” (Heribert et al., 1998, p. 92). Certainly, in South Africa, the mandate for the ANC is clear as they strengthen their position politically over time. Only when there is a strong enough opposition so that their hold on power becomes threatened, and they are required to hand over the keys of power, will it become evident whether a consolidated democracy has been achieved.

### **2.3.6 Democratisation Linked to the Current Study**

There are several issues from these elements of colonialism, cultural imperialism, postcolonialism, and democratisation that have an indirect influence on the educational outcomes of children with disabilities. Nelson Mandela achieved what some term the miraculous at the time of the 1994 elections by averting the potential blood-bath predicted by so many. He managed to “defuse the threat of counter-revolution by the white right and put an end to the internecine violence between his ANC and Chief Mangosuthu Buthelezi’s Inkatha Freedom Party (IFP) which claimed

some 25 000 lives between 1983 and 1996" (Sparks, 2003, p. 4). The IFP's main support base was the Zulus. While at a leadership level the tensions between the ANC and the IFP declined and violence was reduced, and indeed subsequent elections have shown the decline in popularity of the IFP, in some areas mistrust of the ANC persists in KZN as this is the home base of the IFP. Disenchantment with the IFP's agreement to work with the ANC has contributed to its political decline. In the current study, consideration is given to whether the distrust of the ANC by some people in KZN was an influential element. Whether local government and the general population were supportive of the ANC, and whether they were inclined to embrace legislated changes as readily as those who were ANC supporters, was explored. Several participants in the current study were affected by these aspects, particularly by the legacy of violence.

The exploration of democracy and democratisation allows us, also, to understand the political fragility at the time when the study took place. We gain insight into the intense uncertainty of individuals as they came to terms with newfound freedom, and interpreted what democracy would mean for them in reality. The literature suggests that for some the changes were momentous but for many, especially the rural poor, their day-to-day reality had not changed. The snapshot of the two schools illustrates this clearly. The disillusionment of some participants, and the new empowerment felt by others within this political context is explained, and the depth of impact this has on children in the centre of the study, those with disabilities, is explored.

In interpreting the data in the current study it is important to remember that democratisation is a process. While every citizen can vote and it is the intention of the ANC to strive towards a liberal democracy where there is protection of individual and minority rights (Daniel, 2000; Diamond, 2000; Rapoport & Weinberg, 2001a), it seems that South Africa is yet to attain this. The desire to protect individual and minority rights, as well as a desire to address social inequalities (Plattner & Espada, 2000), is clearly reflected in the education policy documents (Department of Education, 1999, 2000, 2001) where the aim is to build an inclusive education system. Part of the value of this study resides precisely in evaluating the progress made towards translating policy into practice in the context of a new democracy.

In interpreting the data, therefore, it is not merely a case of analysing inclusive education using the *Index for Inclusion* (see 2.2.5) from a developed world perspective. It is not just a case of evaluating policy statements and measuring them against the reality experienced by participants. No. It is far more intricate, involved, and nuanced than that. The challenge education policy writers face in meeting diverse needs, epitomised by Schools C and J, is explored. Consideration is given to how aspects of the historical context of colonialism and democratisation factored in as educators strove, in regular education, to ensure the maintenance of standards on the one hand and the raising of them on the other. It was imperative that the initiative of inclusive education be interpreted in light of these challenges.

This exploration of democratisation allows us, furthermore, to understand that a problem for the current government is where to prioritise its efforts and where to place its finances. It seems that at the time of the study, South Africa, indeed, resided then in “an interval of intense uncertainty” (Bratton & van der Walle, 1997, p. 10). At the time of the current study the ANC was grappling with the following:

- Education was seen as key, but at times the urgent took precedence over the important. For example, the people exhorted them to provide the basic necessities of life such as housing and electricity.
- Violence is frequently found in the process of democratisation (Henrard, 2000; Rapoport & Weinberg, 2001b) and understandably a priority of the current government was to minimise violence (P. Du Toit, 2001; Sparks, 2003). The legacy of violence pre- and post elections impacted on the democratisation process, playing a part at that level, but it was also a feature of data in the current study as society, families, schools and children coped with violence on a regular basis.
- Herbst (2001) notes that frequently lack of resources is an almost insurmountable problem in the attainment of democracy. In South Africa when the ANC took over in 1994, “the new administrators found they had inherited not only the horrendous social distortions inflicted by 342 years of racial oppression, but also a legacy of massive fiscal and administrative incompetence” and they realised “the country was close to bankruptcy” (Sparks, 2003, p. 188).

In the current study cognisance has been taken of these factors. Because of the straitened financial situation when they took over in 1994, the ANC was forced to change its fiscal policy completely if South Africa was to survive. It changed “from a left-wing socialist position that envisaged large-scale nationalization to a position where it has now embraced free-market orthodoxy that involves large-scale privatization” (Sparks, 2003, p. 170). To exacerbate the financial situation, health services were under enormous pressure from the increased number of people with HIV/AIDS. The incidence increased exponentially between 1990 when fewer than 1% of pregnant women attending public health clinics were infected, to 25% in 2001. By 2005 AIDS would account for 40% of deaths throughout South Africa, and for 55% in KZN (Dorrington, Bradshaw, & Budlender, 2002). These factors have held implications for fiscal policy as well as for the implementation of education policy, and this current study explored whether there had been a significant impact on the funding of social welfare for participants, thus impacting on the financial capacity of some parents. Finally, this section of the background to the study on democratisation provides insight into the government’s policy decisions regarding education and more specifically inclusive education. Whilst considered really important, they were not the only priorities of the ruling government. This knowledge and understanding allows for more meaningful interpretation of the data in the current study.

## **2.4 Regular Education, Special Education, and Inclusive Education in South Africa**

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### **2.4.1 Introduction**

Having discussed the field of inclusive education and having placed the current study in its political context, it is now necessary to bring these themes together by considering the specific context of education in South Africa. The interpretation of the data in the current study, regarding children with disabilities, needs to be cognisant of the historical and current trends in education.

### **2.4.2 Regular Education under Apartheid**

For 342 years under colonialism and apartheid, before the advent of democracy in South Africa, the majority of the South African population experienced exclusion in political, economic and educational arenas. In the years following the election of the Nationalist Government in 1948, the divisions between Black, White, Indian, and Coloured population groups became set in the concrete of government legislation (Behr, 1988). Inequities in education abounded. The pre-democratic regime effected the systematic privileging of White students in most educational areas. They were afforded more opportunities and the physical resources were superior, as was the quality of curriculum content and teaching.

Funding for schools was racially based: in 1994, just before the first truly democratic elections, government per capita funding for Black college and school children was about R1600 (in South African rands) per year. In contrast, White students received funding of R4772 per year. The consequence of this was that a far lower percentage of Black students enjoyed academic success. Out of every 1000 Black students who started Grade 1 in 1982, four hundred completed Grade 10. Of these four hundred, 380 completed the Grade 12 exit matriculation examination. By comparison, of 1000 White students who started Grade 1 in 1982, all except 80 made it to Grade 10 and 780 matriculated (South African Institute of Race Relations, 1996).

The educational programmes offered to students differed markedly. Dr Hendrik Verwoerd was the author of the script which, when played out, saw the promotion of the disparity between Blacks and Whites. Well-qualified teachers with superior resources offered programmes for Whites that enhanced their ability to enter programmes which would equip them to fulfil white collar and skilled employment which paid better wages (Cross, Mungadi, & Rouhani, 2002). As Minister of Bantu (Black) education and later as Prime Minister, Verwoerd ensured that the curriculum offered to Blacks would produce unskilled and semiskilled labourers, successfully blocking their access to further academic and technical training (Nkomo, 1990; Wolpe, Unterhalter, & Botha, 1991). He ensured that no person would access education that

would allow “expectations in life which circumstances in South Africa do not allow to be fulfilled” (House of Assembly Debates, 1953, col 3576), indicating that there was no point in educating Blacks for jobs which were reserved for Whites.

In Black schools, teacher beliefs linked to Fundamental Pedagogies (FP) which has been the dominant theoretical discourse in South African education. It had been pervasive in teacher education thus dominating the education of most Black teachers (Penny, 1988). The kernel of FP lies in Calvinist doctrine, which embodies the notion of divine authority, with human obedience being central to the inherent core of education. Values and knowledge are considered absolute, objective as they have been scientifically derived, through ostensibly phenomenological principles. The belief that FP is both divinely sanctioned and scientific, has led to a belief in knowledge as universal, consistent, true, and ideologically neutral. As argued cogently by Enslin (1990), “It is in the claim that FP is a science that the discursive device of prohibition is exercised... the political thus becomes forbidden speech. It has no legitimate place in the realm of science... FP criticises anyone who starts outside the phenomenon, i.e. education, claiming that this is ideological” (Enslin, 1990, cited in Nkomo, 1990). This view has extensive implications for pedagogical relations in that the child is viewed as incompetent, dependent, unskilful, ignorant, undisciplined and irresponsible (Enslin & Pendlebury, 2000), and it is therefore incumbent on the teacher to discipline and mould the child on the journey to adulthood. Authority and obedience are therefore key aspects of the pedagogic process. Wedekind (1995) explains that teachers are projected as the holders of all knowledge and their authority is unquestionable. The pedagogic relationship between student and teacher is one of submission to the authority of God, who is represented by the teacher. Questioning the teacher is considered a sign of the child’s intrinsic evil and this must be punished to save the child.

This translates into autocratic and often technical directives, the uncritical dissemination and consumption of information pre-selected by experts, rote-learning, a positivist emphasis on scientific facts as opposed to interpreted values, the provision of few, if any, alternatives, and strict discipline. (Deacon & Parker, 1996, p. 165)

FP, overcrowded classrooms, and insufficient resources coupled with the dominant oral tradition of African culture meant that in practice extensive use was made by

teachers of chanting, referred to by them as the choral method. This is the practice where the teacher provides the information to be learnt in short sentences or phrases which are repeated by the whole class, chanting the words until they can be repeated verbatim. Berry (2006) points out that inquiry learning is unlikely “to occur in classrooms where recitations are the norm and where the teacher and classroom texts are considered to hold the key to knowledge” (p. 500). The choral method tended to lead to one type of learning only (Deacon & Parker, 1996), seated in a transmission theory of education.

In South Africa, prior to 1994, to effect the implementation of its differentiated philosophy, there was a convoluted arrangement of 19 different departments of education which ran parallel to one another, divided on racial grounds and inequitably funded (Behr, 1988; Donald, 1993). The result was many drop-outs, push-outs, unschooled, illiterate, and unskilled youth (Csapo, 1996). While White education was free and of superior quality, Black education was worse than in many developing countries, and was not free. “Buildings were derelict, 30% had no electricity, 25% no water, 50% no sanitation and one third of the teachers were unqualified” (Sparks, 2003, p. 220).

All of this conspired to make education an “explosive frontier of black anger and political resistance” (Sparks, 2003, p. 221). Because of the politicised nature of education, the culture of learning became a casualty. Many Black students coined the slogan: “First liberation, then education”, but education for many never came because teachers and principals were seen to be supportive of the apartheid regime, to be therefore despised and sometimes even murdered (Sparks, 2003). This phenomenon resulted in a ‘lost generation’ who remain uneducated.

### **2.4.3 Historical Perspective on Special Education**

In the pre-democracy climate of racism in education there were, not surprisingly, differing provisions made for children with disabilities (Wolpe et al., 1991). For White children with mild disabilities, educated within regular education, there were several

supports in place. A psychological services unit was established in each area, several within each province, serving the White schools. The unit comprised itinerant remedial teachers with special education qualifications, an educational psychologist, a speech-language therapist, an occupational therapist, and allied staff to attend to the administration of the unit.

White parents of children with disabilities also, therefore, had the option of enrolling their children at special schools which were staffed with low pupil to teacher ratios, all staff having suitable qualifications. Medical staff trained in paediatrics in their particular field, like speech-language therapy or physiotherapy, were employed at each school (Nkomo, 1990).

Inequitable distribution of funding made for a very different picture for Black students with disabilities. Many of them never entered school at all, and those who could find placement at special schools were frequently in large classes with unqualified teachers and support staff (Nkomo, 1990; Wolpe et al., 1991). The disparity in per capita expenditure in special education was even greater than in regular education (I. Du Toit, 1996). Blacks, especially those living in rural areas, had little or no access to any support, despite their representing the majority of the population. This is summarised in the introductory sentence of chapter 1 of the new policy for special education in 2001: "Special needs education is a sector where the ravages of apartheid remain most evident" (Department of Education, 2001, p. 9).

#### **2.4.4 Regular Education in Post Apartheid South Africa**

The first free and fair elections in South Africa took place in 1994 with the ANC becoming the ruling party. Major reconstructing followed: schools were racially integrated by law, although many Black schools remained Black. The 19 different departments of Education were restructured to have nine provincial departments of education and one national department. The national education department saw its primary role as that of attempting to promote equity with the reprioritisation of resource allocation across and between provinces. This reconstruction immediately

provoked different anomalies, contradictions, and tensions, however (Jessop, 1997). For example, the new Minister of Education, Sibusiso Benghu, in an attempt to overcome the problem of unskilled teachers, implemented a scheme whereby skilled teachers were forced to transfer to schools in poorer regions or face retrenchment. Many preferred to take the retrenchment package and start another career. The result was that the chronic shortage of skilled teachers worsened (Sparks, 2003).

The empowerment construct was popular in all spheres of government including education. Despite the ideals, ideology, and fervour amongst policy-makers, school enrolment increases were minimal, running at 3.5% per year (Chrisholm, 1995). The newly-formed National Education Department focused primarily on a more equitable redistribution of resources, the deracialisation of education, and the development of educational policy. They did not address the problem of 1.5 million youth who were of school-going age but were not in schools (Sparks, 2003). Arnott and Bot (1993) found that student/teacher ratios in rural areas “can and do exceed 100:1 often because of the shortage of classrooms” (p. 3).

Even within the context of changes that were effected, as Cross et al. (2002) point out, it was extremely difficult for new ideals to be realised because of the tensions inherent in any form of educational change. Fullan (1991) describes educational change as being fraught with problems, as the ideals and philosophy need to be owned by the teachers in the classroom before there is any real change for students. He, furthermore, notes that “most schools suffer from innovation overload” (Fullan, 2003, p. 34) and that these innovations can collide. Nakabugo and Sieborger (2001) concur, maintaining that many teachers found the paradigm shift to the post apartheid Grade 1-9 curriculum very challenging as there was insufficient training to see it satisfactorily implemented. Despite pressure from an increasingly disenchanted population, the ANC was unable to provide free education for all as they had promised pre-election. Instead, in 1996, they promised a ten-year phase-in of free and compulsory education, with those students starting school that year as the first to be exempt from fees (Pape, 1998).

When Kadar Asmal was made Minister of Education after the 1999 elections, further initiatives were instituted. While acknowledging ongoing problems, there was

cohesive movement towards improved educational outcomes. While his department had the responsibility for educational planning and determining national norms, it was dependent on implementing changes through the nine provincial departments whose administrators were “sometimes incompetent” (Sparks, 2003, p. 223).

With the coming of the modern and political liberalisation, teachers experienced what Mills (1959) describes as “status panic” (cited in Webb & Ashton, 1987, p. 28). This phenomenon is linked to the collapse of discipline in many schools, but it may also be associated with the discourse of education crisis that pervades the media and by implication villainises teachers. Teachers are not only held up for scrutiny by the press, but they suffer disrespect at the hands of students who have regarded them as part of the of the apartheid regime (Naidoo, 1990). Loss of respect for teachers’ status is not only based on the perception that they propped up a failing system, which was benighted by greed and incompetence, but also is part of the political legacy of resistance, ungovernability and liberty before education. Yet status panic among teachers is not a new or unusual phenomenon worldwide, where the flatness of the career structure for teachers with its few promotion opportunities has long caused dissatisfaction (Goodlad, 2004; Lortie, 2002; Sarason, 1990; Webb & Ashton, 1987). It is simply exacerbated by ideological and historical factors in South Africa.

There is also still a legacy of teacher demotivation. Sparks (2003) quotes Helen Zille, the reporter who exposed the truth about the death of Steve Biko in detention: “Some teachers see their job simply in terms of a salary and perks” (Zille cited in Sparks, 2003, p. 223). She reported a survey taken in one of the nine provinces which demonstrated that much time was wasted at schools, and that in fact only an average of 45 minutes a day of actual teaching was occurring (Sparks, 2003).

A study (Zulu, Urbani, van der Merwe, & van der Walt, 2004) on the prevalence and impact of violence utilised a random sample of 288 students, drawn from a possible 14,400 in 15 high schools in the KwaMashu area of KZN. Some of the findings were that:

- “76% of respondents had witnessed a physical attack on a fellow learner
- 38% had witnessed such attacks on an educator

- 64% of students bring weapons to school
- 60% of respondents' parents or guardians were unemployed" (Zulu et al., 2004, p. 172).

These authors conclude that overcrowding and overage learners contribute to the culture of violence, as do poverty and the lack of parental support for academic endeavours. They maintain that a positive culture of teaching and learning, epitomised by "a spirit of dedication and commitment" to school which is achieved through cohesion in school management and teacher input, positive personal characteristics of students, supportive factors in the family life of students, "were, sadly, absent in the case of the 15 schools investigated in this project" (Zulu et al., 2004, p. 174). They conclude, therefore, that violence with its various causes, is a key impediment to a culture of teaching and learning.

Other forces factor in as well. The World Bank, the International Monetary Fund (IMF) and the Swedish International Development Agency (SIDA) became players in South African politics. Newly elected leaders relied on IMF, SIDA, and World Bank advice and the power dynamic in their relationships did not always see the ideals of the newly elected government come to fruition (Brock-Utne, 2000; Pape, 1998). An example of the "intellectual recolonisation of the African mind" (Brock-Utne, 2000, p. 8) is the carefully calculated control exerted by the monetary powers that enforces, for example, the use of the most cost-effective textbooks if their money is to be used. These are invariably books already in print. Consequently, production by African publishers is limited. Furthermore, little cultural input or re-examination of local knowledge regarding the curriculum content is being promoted, and few mother tongue texts are available.

With the disintegration of the Eastern Bloc and its opposition to capitalism, financial institutions like the World Bank and the IMF promoted free market economies favouring private investment. While South Africa has historically underinvested in equipment, the move to mechanisation resulted in a substantial drop in jobs. The implication for the masses was that mechanisation saw unemployment become

rampant, with the children of the unemployed thus excluded from education which was not yet free.

In the lead-up to democracy, South Africa had many grass roots community organisations, under the auspices of the Mass Democratic Movement, which had been vociferous on educational issues including course content. The Mass Democratic Movement was disbanded in 1995, and its voice largely became lost, swallowed up in the cacophony of newly developing organisations. Brock-Utne (2000) maintains: “the African child’s major learning problem is linguistic” (p. 141), and she goes on to argue that content should be imbued with African values, norms and traditions. Morrow, Jordaan and Fridjohn (2005) undertook a study involving over 180 Grade 7 students in eight schools in urban, rural, and townships in Gauteng and KZN. Their findings support those of Brock-Utne (2000) in that students in Johannesburg were more proficient in English than isiZulu, and township school children were equally competent in both languages, but less competent than their counterparts in Johannesburg. In KZN students were much more competent in isiZulu than English, and would thus be disadvantaged in education where the medium of instruction is English. While many maintain that curriculum content should be culturally-relevant (Pape, 1998), financial constraints have not made this ideal achievable.

Those who would seek to be a voice for the poor are sceptical about whether new policies will be implemented in a way that will meet their needs. Following Burkey (1993), in the current study, poverty is defined firstly in terms of basic needs, such as clothing and shelter, clean air and water, adequate and balanced food, physical and emotional security, and physical and mental rest; and secondly, in terms of community needs, for example the political system, health and recreation services, education provision, sexual regeneration, and physical and cultural security. As Deacon and Parker (1993) assert: “Rural life is dominated by the imperatives of survival within modernity” (p. 128). Features of poverty such as walking long distances to school on an empty stomach, with resultant fatigue and absenteeism, as well as the demands that poverty places on children to perform multiple roles, are captured in many teachers’ comments. Avalos (1992) confirms the pessimism and restrictiveness of much

education for the poor, which she argues for many children “represents an experience of debasement, of frustration, of learning to be losers” (p. 424).

Avalos (1992) illuminates the tension that exists between education for the poor which seeks to give children skills for their restricted everyday world, as opposed to education which enables student to transcend the everyday realities of their context. In her view it is not an either-or tension, but rather a both-and situation, where education needs to equip children for survival in rural life, as well as to be able to transcend the boundaries of the rural context. Whilst Avalos concedes that there is no uniform way of determining what quality education is for any sector of society she argues for a curriculum which transcends the boundaries of the particular:

In certain respects, in relation to the education of the poor in developing countries, an easy though well intentioned temptation is to say that a non-alienating education ought to help them retain their group allegiance and, therefore lessen the opportunities for contact, understanding and critique of modern culture. To yield to that temptation, however well intentioned, signifies in our view to decide that a restricted world perspective is to be allowed for some groups and not for others. Using other words, it implies accepting that in one society or among different types of society, a form of cultural stratification can prevail which deprives some groups of the power to transcend the restricted everyday life and influence their society as a whole. (Avalos, 1992, p. 429)

This disjuncture between traditional and modern ways of knowing may go deeper in that modernisation and political liberalisation may threaten the fabric of social relations as they exist in rural contexts as teachers indicate by their discomfort with the breakdown of respect. Whether the imperatives of modern ideals, clad in their western dress should be imposed on existing social relations as part of the package or progress is debatable. In any event, some teachers for a variety of reason echo the misgivings of Deacon and Parker (1993): “Access to modernity and to the urban economy that it provides has dubious value for local development, even to the extent of threatening existing social relations” (p. 129).

### ***Outcomes-based education***

Taking all these factors into account, in 1998 the government decided that the way forward would be the implementation of outcomes-based education (OBE) in the form

of *Curriculum 2005* (Department of Education, 1997a). The ideal with its implementation was to emancipate the majority of learners who had not been well-served in the past. It was posited that by introducing OBE “doors of opportunity may be opened for people whose academic or career paths have (previously) been blocked” (Van Wyk & Mothata, 1998, p. 4).

To further this discussion it is necessary to take a brief look at the historical roots of OBE, and the different types that are distinguishable. In the 1960s in the USA *competency-based education* and *mastery learning* were implemented, and are considered the beginnings of today’s OBE (Waghid, 2003). Competency-based education required instruction and assessment aimed at determining learner performance outcomes. Mastery learning refers to individualised approaches that allowed learners sufficient time to master a unit of a curriculum before moving to the next learning unit. Both of these emphasise predictable and measurable learner performance only within the classroom and educational setting, and in terms of education today is referred to as *traditional OBE* (Spady & Marshall in Capper & Jamieson, 1993).

In contrast, *transformational OBE* aims to equip learners with competence, knowledge, skills, and orientations needed for success after they leave school (Spady & Marshall as cited in Capper & Jamieson, 1993). In an extension of this initial view, Spady (1994) identifies *critical outcomes* and *specific outcomes* in OBE and describes them as follows:

- specific outcomes are linked to a particular learning area
- critical or essential outcomes relate to the broader intended results of education.

Eight learning areas were selected for grades 1 to 9 in South Africa when OBE was implemented, and fall under the specific outcomes mentioned above. These areas were: “Language, Literacy and Communication; Human and Social Sciences; Technology; Mathematical Literacy, Mathematics and Mathematical Sciences; Natural Sciences; Arts and Culture; Economic and Management Sciences; and Life Orientation” (Janse van Rensburg & Potlane, 1998, p. 30).

Falling under the critical outcomes mentioned by Spady (1994) are, in the South African context, the learning outcomes of meaning making, critical understanding,

critical analysis, logical formulation, and decision-making (Janse van Rensburg & Potlane, 1998).

Some authors hold that if the emphasis in education rests with the specific outcomes where “every task has been parcelled out and carefully measured by someone else” (Capper & Jamieson, 1993, p. 332) it is difficult for the critical outcomes to be achieved, which are arguably more important as they embody life skills. OBE’s preoccupation with measurable, tangible outcomes does not foster any creativity or critical analysis which would be the essence of what should be aspired to if the critical outcomes are to be achieved (Fakier & Waghid, 2004). The important skills of critical understanding and critical analysis require more than just mastering a set of prescribed, pre-determined, predictable set of outcomes which would be found in the specific outcomes (Passmore, 1998).

Working from the premise that educators who want to promote the development of critical thinking skills in their students need to be able to think critically themselves, Lombard and Grosser (2004) investigated the critical thinking abilities of a cohort of 88 prospective educators in South Africa. On the Cornell Critical Thinking Test, only seven were above the median. Variables of age, gender, and socio-economic deprivation had no impact on achievement. While this research was only exploratory in nature, and the test probably culturally inappropriate, it nevertheless highlights the possibility that teachers themselves may need support in developing their own thinking skills if they are to facilitate the achievement of the critical outcomes of OBE with their students.

The possibility exists, then, that implementation of OBE in South Africa could result in education being trapped at one, functionalist, level. Indeed, because

state policy makers, educational consultants, local administrators and selected educators authoritatively construct outcomes, their claim to operate in a critical frame (with reference to critical thinking and problem solving competences learners need to acquire) might become flawed by power structures such as control and manipulation. (Waghid, 2003, p. 246)

The way OBE has been implemented has proved problematic at times. Jansen (1998) notes that the language used in the documentation around OBE is too convoluted, complex, and at times contradictory. Teachers need to understand, for example, the shift from *competencies* to *outcomes* and how these align with *critical outcomes* and *specific outcomes*. "The language of OBE and its associated structures are simply too complex and inaccessible for most teachers to give these policies meaning through their classroom practice" (Jansen, 1998, p. 323). There are varying interpretations for such crucial assessment terms as formative assessment, summative assessment, and continuous assessment in the Department of Education (1998) policy on assessment, causing further confusion for teachers.

The National Curriculum Development Committee (1996) describes transformational OBE as "a collaborative, flexible, transdisciplinary, outcomes-based open-system, empowerment-oriented approach to learning" (p. 7). Jansen (1998) suggests that this requires a high level of sophistication and well qualified teachers if they are to understand such challenges to their existing practice. According to him this is not being accomplished, and many teachers do not know how *outcomes* differ from *objectives*. Jansen (1999) maintains that many teachers have not changed their planning or their practice. He consistently found that teachers were unsure whether what they were doing indeed constituted OBE, and they uniformly held that their preparation for the implementation of OBE had been insufficient.

For OBE to succeed, simultaneous initiatives are required: trained and retrained teachers, classroom organisation that facilitates assessment and monitoring, radically new types of assessment, opportunities for teachers to discuss and evaluate the process, and additional time for monitoring the complex process (Capper & Jamieson, 1993). In a study evaluating cooperative group work in South Africa, as advocated in OBE, Mkhize (2003) found a discrepancy between what was envisioned by policy writers and practice in classrooms. He, like Jansen (1999), suggests OBE fails because of the absence of adequate support for teachers. Brady (1996) concurs, emphasising that the keys to the successful implementation of OBE, those of "release time, aide support, smaller class sizes..." (p. 13), have not sufficiently been provided for teachers.

The collaboration between parents and educators inherent in the implementation of OBE seems to be difficult to accomplish in certain schools. In an ethnographic study involving 24 parents of students in eight historically disadvantaged schools, it was found that parents were rarely consulted by schools nor involved in their children's education. This was despite the fact that the South African Schools Act envisages a system where school-based educators would collaborate with the parents to ensure quality education, including curriculum matters such as OBE (Republic of South Africa, 1996). The "extremely limited success thus far in the implementation of OBE in historically black communities was significantly due to the absence of co-operation between the school and the home" (Singh, Mbokodi, & Msila, 2004, p. 301).

As discussed in the section on democratisation (2.3), after the first democratic elections in 1994, the general population was hopeful of changes which would redress the inequities of the past. Between the release of Mandela in 1990 and 1994, laws allowing for racial integration of schools were promulgated, and such integration began to occur. The inequitable curricula continued, however, and when the ANC took over in 1994, they felt compelled to move quickly to address the curriculum issue. They concluded it would be preferable, since they were effecting a complete overhaul of the education system, to implement OBE as the best way to accomplish this. Their aim was that by 2005 OBE would be successfully implemented in all schools. The current study took place in 2004 and 2005, and the way that OBE had been implemented in KZN was an important factor in interpretation of data. Consideration was given to the transition from FP to OBE, where it had been successfully implemented, and what some of the hindrances to its implementation were.

### *Regular education and OBE related to the current study*

Since OBE was the first major educational initiative instituted by the new government in South Africa, its successful or unsuccessful implementation could possibly influence teachers' eagerness to embrace another new initiative, that of inclusive education. The current study therefore considered whether teachers in regular classrooms felt comfortable with the implementation of the regular curriculum and whether they felt confident to effect adaptations to it in order to meet the needs of students with disabilities.

As noted by Darling-Hammond (2003), “reforms, we have learned over and over again, are rendered effective or ineffective by the knowledge, skills and commitments of teachers and other professionals in schools. Without know-how and buy-in, innovations do not succeed” (pp. 75-76). This links, furthermore, to efficacy and attribution theory (Weiner, 1985, 1995) where, if people attribute their efficacy to internal factors over which they have control, they are likely to be motivated to embrace changes they believe will enhance their performance. If the attribution of efficacy is to external factors, such as training, and small classes, over which they have no control, they will be less likely to be motivated to embrace change.

Naicker (1999) argues that teachers who have undergone OBE training are, by implication, also exposed to inclusive education since OBE is inclusive by nature. In the current study, however, it is argued that to assume that the principles of inclusive education are subsumed in OBE is to trivialise the philosophy and practice of inclusive education which is far more multifaceted.

The many changes over the past ten years to regular and special education may have been experienced differently by different participants in the current study. Those from the previously advantaged sector might have different beliefs about the usefulness of OBE, its strengths and weaknesses, and the effect it has had on their practice, than those from previously disadvantaged sectors. The current study considered the way OBE was implemented in KZN and the effect this had on teacher morale and possibly motivation. The state of regular education was important to consider in the current study as it was the foundation upon which initiatives to meet the needs of students with disabilities was being built.

#### **2.4.5 Post Apartheid Special Education: The Move to Inclusion**

The notion has been mooted that inclusion in schools is part of a larger process still ongoing in South Africa – that of reducing exclusion in society (Muthukrishna, 2000).

As noted in *Education White Paper 6*<sup>2</sup> (Department of Education, 2001)

The National Disability Strategy condemns the segregation of persons with disabilities from the mainstream of society. It emphasises the need for including persons with disabilities in the workplace, social environment, political sphere and sports arenas. The Ministry supports this direction and sees the establishment of an inclusive education and training system as a cornerstone of an integrated and caring society. (p. 10)

Consequently, policy-makers largely embraced the world-wide trend away from the medical model in special education, favouring the social and ecological models which see inclusive education as the educational ideal and they saw schools as a potential site for promoting inclusion in society through inclusive education. There is acceptance in the policies of the notion that special education needs in South Africa particularly cannot be attributed solely to intrinsic disabilities, like blindness or neurological dysfunction of some sort, but that extrinsic factors such as poverty, language, the impact of the HIV/AIDS pandemic, and abuse need to be included (Department of Education, 2001).

The philosophical perspective adopted in the South African Schools Act (Republic of South Africa, 1996) contributed to policy formation, its analysis and implementation and it established some of the elements, noted above, for a rights based educational system. Hay (2005) holds that the policy documents bear testimony to the idealism which swept the country in the years after the first democratic elections, where inclusive education would evidence the culmination of the struggle for human rights in South Africa. While it might never be possible fully to realise social justice “either by definitions or our actions” (Bogotch, 2002, p. 139), interpretations of social justice are usually based on the equitable distribution of social goods, and education is considered a social good (G. Bell, Jones, & Johnson, 2002; Rice & Ebmeier, 2002). Furthermore, “exclusion of those goods is unjust when distribution is based on marginalizing conditions” (Doyle, 2003, p. 5). Education policy, based on consultative documents (Department of Education, 1995, 1997b, 1998, 1999, 2000, 2001), aspires to a system where stigmatisation and separation will cease to exist and every student’s rights to human dignity, to education, and to equality will be realised. The literature on social

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<sup>2</sup> Referred to as *White Paper 6* henceforth.

justice, while it includes the disabled as a marginalised group, focuses also on issues of ethnicity, race, class, gender, and sexual orientation (Grogan, 1999; Larson & Murtadha, 2002; Lugg & Koschoreck, 2003; Lyman & Villani, 2002; Riester, Pursch, & Skrla, 2002; Shakeshaft, 1999; Shields, Larocque, & Oberg, 2002; M. Young & Laible, 2000). Enslin and Pendlebury (2000), however, argue that in South Africa “inadequacies in the treatment of gender and rights in the new national curriculum threaten to undermine the vision” (p. 431).

Development of educational policy occurred in tandem with the restructuring of the educational system, and the priority of the new government seemed to be to effect general educational change first before addressing the requirements of the disabled community (J. Pretorius & le Roux, 1998). The redistribution of resources did not help the poor, the unemployed or the disabled (Nattrass & Seekings, 2001). The poor and disabled seem not to know how to exercise their vote to help themselves. Since voting and the electoral system were novel to them, this is understandable. Pretorius and le Roux (1998) explain this in terms of “milieu deficiencies and psychosocial handicap” that contribute to the “spiral of poverty” and “obstruct self-actualization” (pp. 689-690). Those who are better educated seem better able to utilise their power through democracy and to demand services to meet the needs of their communities. The less well-educated, and those whose life is a struggle for survival, seem not to be able to exert pressure and access these services as effectively. This is understandable as at least some resources are required to exert the necessary pressure.

Nevertheless, there were positive steps. Muthukrishna (2000) singles out the establishment of the National Commission on Special Needs in Education and Training (NCSNET) and the National Committee on Education Support Services (NCESS) (Department of Education, 1997b) as vital policy initiatives. She maintains that these foster the “paradigm shift from the notion of ‘learners with special needs’ to the concept of ‘barriers to learning and participation’ ... that is rights based” (Muthukrishna, 2000, p. 1). The report from NCSNET and NCESS (Department of Education, 1997b), after completing research, showed that in every site visited there was very low enrolment of students with disabilities in regular schools. This countered the claim that many students with disabilities were included by default in regular

classrooms (Department of Education, 1995). According to the report (Department of Education, 1997b), most Black children in South Africa have been denied equal and appropriate education. The most marginalised and those suffering the worst discrimination are Black rural students with disabilities. The suggestions made in this report were incorporated into *Draft White Paper 5: Special needs education – Building an inclusive education and training system, March 2000* (Department of Education, 2000) which was critiqued and refined before the final paper was introduced.

### ***Policy for inclusive education: White Paper 6***

The Ministry of Education released *White Paper 6* in July 2001 entitled *Special needs education: Building an inclusive education and training system* (Department of Education, 2001). Inclusive education in this White Paper is defined as:

- Acknowledging that all children and youth can learn
  - Enabling education's structures, systems and learning methodologies to meet the needs of all learners
  - Acknowledging and respecting difference in learners, whether due to age, gender, ethnicity, language, class, disability, HIV or other infections diseases
  - Broader than formal schooling, and acknowledges that learning occurs in the home, the community, and within formal and informal contexts
  - Changing attitudes, behaviour, teaching methods, curricula, and environment to meet the needs of all learners
  - Maximising the participation of all learners in the culture and curriculum of educational institutions, and uncovering and minimising barriers to learning.
- (Department of Education, 2001, pp. 6-7)

These six points reflect the major shift from parallel special education and regular education systems to a unitary system that responds to the needs of all students. This White Paper clearly articulates a commitment to the development of an inclusive education and training system. As Francis and Muthukrishna (2004) explain, an "important proposal made in *White Paper 6* relates to the need for changes in the general education system so that learners experiencing barriers to learning can be identified early and appropriate support provided" (p. 110). Indeed, the first 13 points of *White Paper 6* clearly articulate policy embracing a reconceptualist model of inclusive

education, as discussed in the section on inclusive education. This is reiterated in the first point of the long-term goal: “4.4.1 Our long-term goal is the development of an inclusive education and training system that will uncover and address barriers to learning, and recognise and accommodate the diverse range of learning needs” (Department of Education, 2001, p. 45).

Care is taken in the document to be explicit about what inclusive education means in practice, and which was represented in the form of the table below:

<b>‘Mainstreaming’ or ‘Integration’</b>	<b>‘Inclusion’</b>
Mainstreaming is about getting learners to ‘fit into’ a particular kind of system or integrating them into this existing system	Inclusion is about recognising and respecting the differences among all learners and building on the similarities.
Mainstreaming is about giving some learners extra support so that they can ‘fit in’ or be integrated into the ‘normal’ classroom routine. Learners are assessed by specialists who diagnose and prescribe technical interventions, such as the placement of learners in programmes.	Inclusion is about supporting all learners, educators and the system as a whole so that the full range of learning needs can be met. The focus is on teaching and learning actors, with the emphasis on the development of good teaching strategies that will be of benefit to all learners.
Mainstreaming and integration focus on changes that need to take place in learners so that they can ‘fit in’. Here the focus is on the learner.	Inclusion focuses on overcoming barriers in the system that prevent it from meeting the full range of learning needs. The focus is on the adaptation of and support systems available in the classroom.

(Department of Education, 2001, p. 17)

The document clearly states the intention of achieving inclusion rather than mainstreaming or integration. It notes at the same time, however, that belief in and providing support for a policy of inclusive education are insufficient to ensure that such a system will successfully be translated into practice.

There then follows an explanation of the short-term and medium-term steps to be taken as the long-term goal is realised. These include:

- the strengthening of special schools so that they can serve the needs of the severely disabled and also be resource schools to full-service schools in the area which will serve the needs of those students with mild or moderate needs;
- the conversion of 500 out of 20,000 primary schools into full-service schools;
- the mobilisation of 280,000 disabled children outside the school system;
- the general orientation in regular education towards the inclusive model;
- the establishment of district-based support teams that utilises and coordinates expertise of professional support services within special and full-service schools; and
- the launch of a national advocacy and information programme to counter discriminatory practices in society (Department of Education, 2001).

A 20-year time frame envisaged for the implementation of these six key steps is as follows:

- 2001 – 2003    Implement advocacy programme; transform 30 special schools to resource schools and 30 primary schools to full-service schools; implement support teams
- 2004 – 2008    Expand the above in line with lessons learned from initial implementations
- 2009 – 2021    Expand provision to reach targets (Department of Education, 2001).

Here some anomalies are apparent. The current research considered whether a 20-year plan reflects an inability to effect rapid change, and those who are affected may consider it inadequate and ineffectual as several generations of children will have passed through the education system in 20 years. Furthermore, these strategies reside firmly in an incrementalist model of inclusive education where individual needs are targeted and where needs are met in several settings, not necessarily in the regular classroom. These short-term and medium-term steps are at variance with the reconceptualist philosophy outlined in other parts of the same document (Department of Education, 2001). It is possible for one stakeholder to cite one part of the document and use it to insist that a child has the right to be included in a regular classroom, and for another stakeholder to cite another part of the document and claim that the specific

school is not part of the interim steps being taken in the short-term goal, and that the child should attend a resource school or a full-service school. The current study explored the conflicting approaches and considered how participants interpreted seemingly contradictory messages in their translation of policy to practice, and what the outcomes were for children with disabilities. These were interesting tensions as the current study considered whether the steps taken to date were indeed leading towards inclusion in education.

In evaluating the success in developing countries of overcoming barriers to learning in an inclusive model, India (2000) notes largely a lack of ability in these systems to enrol and retain vulnerable and marginalised groups. This author notes the necessity of providing, within the educational system, quality education with an emphasis on all marginalised groups, but asserts that developing nations almost invariably do not achieve this goal. Charema (2005) concurs, noting that in countries where the rate of unemployment is high and resources are scarce, the scope of educating the disabled is limited. He focuses on the rural areas where there are extremely limited levels of facilities and awareness, and notes that while research shows that 87% of disabled in developing countries reside in rural areas, the majority of education and training facilities are found in urban areas addressing the needs of relatively less impoverished people. He goes on to emphasise the need not simply to place disabled children with their peers causing undue burden for teachers and peers, but rather to ensure provision of adequate resources and support, with appropriately prepared teachers. The challenges he notes are:

- inadequate support services,
- lack of appropriate facilities and materials,
- ineffective policies and legislation,
- inadequate teacher education programmes, and
- lack of relevant research information.

With the barriers to learning approach to inclusive education and with directorates of inclusive education at both national and provincial levels, South Africa has one of the best inclusive education policies in the world (Mitchell, D. quoted by C. Pretorius, 2006). The current study focussed on whether the translation of policy to practice in

KZN was being more successful than is sometimes the case in developing countries (e.g. Charema, 2005; India, 2000).

### *Research on inclusive education in South Africa this decade*

Most research subsequent to democracy has taken place within the reconceptualist model where “the discourse of inclusive education was located in the dialogue of social inclusion and social exclusion” (Muthukrishna & Sader, 2004, p. 21). Barriers to learning identified include poverty, abuse, the impact of AIDS, and language, as well as disability. Muthukrishna (2000) describes the findings of a project funded by SIDA that spanned the rural areas of KZN and the urban Pretoria region five years after democracy. She notes that while there had been some positive indications that steps had been taken towards inclusive education, there were still many seemingly insuperable barriers. As well as intrinsic factors, others like gangsterism, family violence, and poverty were still impacting heavily on the provision of education. Over-age learners<sup>3</sup> were a further problem facing teachers together with the many home languages of students. Sometimes there were 15-17 year olds in grade 3 and 4, class sizes being sometimes over 50. Lack of infrastructure and poor facilities were noted, as well as several new initiatives, such as OBE, which teachers were required to implement but which lacked cohesion. The preoccupation with improving matriculation results and the huge deployment of peoplepower chasing this ideal, was working to the detriment of access to basic education by all students as a focus (Muthukrishna, 2000). In a study undertaken in three provinces (KZN, the Western Cape and the Eastern Cape), Sayed and Soudien (2005) illuminated a “disjuncture between policy intention and effect” (p. 115). These authors found that the quintile funding where the top 20% of schools received the least funding and the lowest 20%, the most, was ineffectual at closing the achievement gap between previously advantaged and disadvantaged schools during apartheid. Decentralisation of authority to school boards had resulted in some schools charging school fees beyond the means of many families, and also using learner admissions as a means of improving matriculation results, excluding learners they perceived as potentially being

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<sup>3</sup> Over-age learners: students who are considerably older than their classmates in that year of study.

unsuccessful. This tension between raising standards and social inclusion is not unique to South Africa, as noted earlier.

In the SIDA funded study (Muthukrishna, 2000), HIV/AIDS has a high priority. As the pandemic takes its toll, the number of infected school-aged children increases as does the number of AIDS orphans. All these are barriers to learning and are rightly addressed in research undertaken in a reconceptualist model of inclusive education.

Increased teacher stress with the implementation of inclusive education in South Africa has been noted. A study involving 107 teachers (Engelbrecht, Swart, Eloff, & Forlin, 2000) showed that the most stressful issues for teachers including students with disabilities in their classes related to behaviour of the students, parents of the child with disabilities, and their perceived lack of confidence in their ability. Almost half the teachers were including students with intellectual disabilities and they experienced significantly more stress than teachers including students with physical disabilities.

A narrative study (Eloff & Kriel, 2005) reporting the experience of a single educator in the inclusive setting painted a vivid picture of the influence this initiative had on her emotionally, and the physical and spiritual ramifications. To cope, she used humour, she externalised and depersonalised the problems, and then found it easier to seek solutions. Documenting her stress and resultant physical and emotional consequences helped her see progress in her journey towards being able to cope. Her relationships with colleagues, the principal, and her close and extended family played a key role in the development of coping strategies. The point of the study is

- to emphasise the intensely personal and individual response teachers have to the implementation of the inclusion initiative in South Africa,
- to highlight concern regular educators have that they might not cope, and
- to stress that specific supports need to be provided for teachers.

A study by Swart et al. (2000) investigated teacher attitudes to the implementation of inclusive education by surveying over 100 teachers in schools representing the whole spectrum of schools found in South Africa. Their findings suggest that regular educators do not feel that they have had adequate training nor do they possess the

skills and networks to ensure that they provide quality education for all students. These findings are supported by a study investigating parents' experiences of their rights in the implementation of inclusive education (Engelbrecht, Oswald, Swart, Kitching, & Eloff, 2005). These authors found that when parents tried to have their disabled child included, they encountered "a gap between the idealism of inclusive education and the philosophy and resources of the professionals they have to collaborate with" and "lack of enthusiasm of teachers and administrators for inclusive education" (pp. 462-463).

In a study about how inclusive education policy has influenced practice in a special schools, Van Eck (2004) notes that these teachers experience added stress as a consequence of uncertainty about the future of their school, and increased expectations if they are to be the resource school providing support to other schools in their cluster. Furthermore these teachers feel overburdened with now completing all the administration required by OBE in addition to the relatively heavy administrative load already experienced by virtue of teaching at a special school.

In a study with 47 purposively selected participant teachers in previously disadvantaged schools, Geldenhuys and Pieterse (2005) found that poor pre-service and in-service education, high student to teacher ratios, low socio-economic background of students, lack of resources, and perceived lack of educational support caused teachers to have poor expectations of successfully implementing inclusive education.

Engelbrecht (2004) highlights the central role that can be played by educational psychologists "in meeting learners' needs, reducing their exclusion from school curricula and communities and facilitating change in South Africa" (p. 21). She notes that this new objective requires a conscious shift on their part from the medical deficit approach of the past to a reconceptualisation of their roles which acknowledges that inclusive education demands "the development of a culture which embodies eco-systemic and inclusive values within a holistic approach to support" (p. 21). They need to work collaboratively with special and regular educators, defuse issues regarding who owns areas of expertise, play an advocacy role where necessary, and promote the

adoption of a shared vision. As Engelbrecht (2004) points out, however, educational psychologists have infrequently received instruction in group collaboration and have had minimal opportunity to practice. She notes that it will take “patience, perseverance and time” (p. 21) before they are competent in these roles.

A UNESCO funded project has been undertaken to trial the British *Index for Inclusion* in South Africa so that a model can be developed for assisting the achievement of inclusive schools in South Africa. Phases one and two of a five-phase study have been completed, using three schools in the Western Cape province (Engelbrecht, Oswald, & Forlin, 2006). These authors report that the majority of teachers were unfamiliar with the content of *White Paper 6* or with the vision for inclusion in education in South Africa. Initial indications, from phase one and two of the project, are that once the *Index for Inclusion* has been contextualised for South Africa, it could be a useful tool for the promotion of inclusive education in schools.

These studies demonstrate that there are many challenges in the implementation of inclusive education in South Africa. They also highlight that inclusive education is fundamentally affected by social factors like poverty, violence and HIV/AIDS.

#### **2.4.6 Conclusion and Summary**

The prioritisation the government has given to deracialising education, and to the redistribution of resources along non-racial grounds is understandable in light of the socio-political situation in South Africa. In practice this meant the restructuring of the national and provincial education departments, the gradual implementation of free education for all from grades 1 – 9, and the rewriting of the curriculum to eradicate the racist foundation of the pre-democracy curriculum. This was accomplished through the implementation of OBE.

This is the context within which the current study took place, and the circumstances in regular education were of significance as the policy ideal is to have children with special education needs provided for within a unitary education system. The needs of

students with disabilities are specifically addressed in *White Paper 6* where the intention of building an inclusive education and training system is clearly stated. As soon as inclusive education becomes the ideal, the state of regular education becomes germane.

For the current study, the establishment of NCSNET and NCESS, the findings of these two bodies, and the consequent development of *Draft Education White Paper 5* (Department of Education, 2000), and *White Paper 6* (Department of Education, 2001) were pivotal as it is here that policy for students with disabilities resides. As these policies were being translated into practice, the current study explored what the outcomes have been for students with disabilities in KZN.

Few studies have evaluated the interim steps articulated in *White Paper 6*, situated in an incrementalist model of inclusive education and which target one group of students only, those with disabilities. There are two probable reasons for this:

1. government initiatives are focused on barriers to learning and with other significant barriers, such as language, poverty, and HIV/AIDS and the interim steps addressing barriers for a small minority of disabled students, become less of a focus; and
2. funding agencies for research from outside of South Africa, such as SIDA, prefer to support research which is premised on a reconceptualist model of inclusive education because of international trends to approach inclusive education from within this model.

Issues which arise in the literature and which are of relevance to the current study again group broadly under three headings: teacher issues, parent and child issues, and resource issues.

### ***Teacher issues***

The educational changes that have taken place in South Africa have been significant, and educational change was potentially unsettling for teachers at the chalk-face, contributing to teacher stress and possibly even leading to teacher demotivation. The government's top priority was to address the racist curriculum which existed pre-

democracy. Their means was to implement OBE, but the implementation has been problematic (Jansen, 1998; Lombard & Grosser, 2004; Waghid, 2003). The current study analysed participants' views on the implementation of OBE, and considered whether this, too, may have affected teacher morale, motivation, readiness and inclination to embrace a further new initiative, that of inclusive education. Teacher motivation to perform and to adopt new initiatives is foundational to the educational outcomes of children with disabilities and is critical to the successful achievement of an inclusive education system, and these aspects were therefore taken into account in the current study.

While the government was committed to maintaining high educational standards at schools where they already existed, at the same time they were attempting to raise the educational standards in previously disadvantaged schools. From this perspective, the current study explored whether the government yardstick of evidence for successful schools, measured by good matriculation results, runs counter to the ideals of inclusive education in KZN.

Furthermore, the current study investigated to what extent participants believed that the skilled teacher shortage contributed to the problems encountered with the implementation of OBE. If this shortage had led to the continuance of large class sizes, the current study considered whether teachers assumed that this impeded their capacity to make adaptations to meet individual needs.

The literature (Brady, 1996; Jansen, 1999; Mkhize, 2003; Singh et al., 2004) indicates that certain elements are prerequisites for the successful implementation of OBE. Six of these are:

- Trained and retrained teachers
- Sophisticated teaching to achieve critical as well as specific outcomes
- Support for teachers
- Classroom organisation that facilitates group interaction, assessment, and monitoring
- Smaller class sizes
- Collaboration with parents.

The literature (Brady, 1996; Capper & Jamieson, 1993; Jansen, 1998) indicates that frequently OBE was being implemented with insufficient teacher education and support in South Africa. It is important that initial and in-service teacher education leaves teachers feeling equipped to cope with diversity in the classroom if inclusive education is to be successful. The current study aimed to establish what teachers' perceptions, beliefs and practices were and captured the view of teacher participants on these issues.

Social problems, such as poverty, overage learners, abuse, and the effects of the HIV/AIDS pandemic were aspects identified in the literature (Zulu et al., 2004) that potentially have a greater impact on the role of teachers in South Africa than is the case in developed countries where inclusive education is being implemented. In-depth consideration was given to the day-to-day reality in KZN in these respects, as this was foundational to the interpretation of the data in the current study.

#### *Parent and child issues*

Important in the current study is the fact that *White Paper 6*, reflecting both reconceptualist and incrementalist approaches to inclusive education, may be sending a mixed message to parents. The current study explored whether this caused confusion for participants and whether it caused them to be unclear what their rights were and what the responsibilities of their local schools or special schools were. It investigated whether, for some parents, a 20-year plan might mean that change occurs too slowly for immediate needs of children with disabilities to be met. Furthermore, the current study considered how children with disabilities were perceived in a reconceptualist model.

The literature (Brock-Utne, 2000; Morrow et al., 2005; Pape, 1998) highlights that many children have English as an additional language and the medium of instruction is English in KZN. Other barriers to learning such as abuse, neglect, and violence are prevalent in KZN in many instances, and this study explored how they may factor in, in two ways:

1. these barriers could have particular and additional implications for children who have a disability, and
2. teachers might be overwhelmed overcoming these barriers to learning and be less inclined to effect adaptations to meet the needs of disabled students.

Finally, the literature (Avalos, 1992; Burkey, 1993; Deacon & Parker, 1993) emphasises the impact of poverty, particularly in rural areas, and the current study considered to what extent poverty affected parents' ability to access necessary resources and, in some cases, education for their children. In the current study this allowed the examination of educational provision across both rural and urban settings.

### *Resource issues*

It becomes clear in the background to the study that financial constraints have caused the government to prioritise finding solutions for problems in regular education above the inclusive education initiative. Inclusive education remains the ideal of government, but the legacy of apartheid has forced them first to address acute needs such as toilet facilities and providing schools with electricity, which are barriers to learning for all students. Financial constraints have seen them implement a 20-year plan and the current study considers the issue of whether this caused some students to be inadequately provided for as interim steps were phased in. The literature (Geldenhuys & Pieterse, 2005; Muthukrishna, 2000; Sayed & Soudien, 2005; Swart et al., 2000) suggests that specific structural changes, small classes, and empowered, educated teachers necessary for the successful inclusion of students with disabilities in education were too costly to be implemented nation-wide in South Africa. The current study provided information on progress made in KZN in the quest for inclusive education.

In the current study students with disabilities were specifically targeted, and in this way this study differs from much other research undertaken in KZN, which has focussed on the wider picture of inclusive education within a reconceptualist model.

## 2.5 Disability Discourses

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### 2.5.1 Introduction

The last theme to be investigated in the background to the study is that of disability discourses. As pointed out by Muthukrishna (2000) inclusive education occurs in the wider context of society, and societies can be inclusionary or exclusionary. Discourses around any topic, including disability, play a hand in shaping it, creating the reality for the people involved. As in any country where there are diverse cultures, there are likely to be different discourses around a phenomenon such as disability, and it is useful for the interpretation of the data in the current study to comprehend the differing discourses around disability that are found in KZN.

Derrida (1982) presents the idea that the language used for communication shapes the meaning of the object it is describing, whether this object be a feeling, a thought, or a social phenomenon. He highlights that describing an object or phenomenon is often clearer if it is contrasted with what it is not, provoking a duality. Examples might be wealth versus poverty, educated versus uneducated, health versus disease, literate versus illiterate, and normal versus abnormal. In each of these not only is the contrast emphasised but the second is conceptualised as the negative, unacceptable, and undesirable. "The immutable trace of the difference of an Other thoroughly permeates the historicity of Western knowledge" (commentary by Trifonas in Derrida, 2002). Lather (1993) agrees that discourses around any topic are important as they are instrumental in shaping it. She maintains that discourse "worlds the world" (p. 675) giving that topic perspective and parameters, defining attitudes and social assumptions regarding it. Harrison, Edwards and Brown (2001) concur, describing discourse as "the forms of language used in thinking, feeling, speaking or writing which produce meanings, or constitute ways of understanding the world" (p. 205). Agreeing with Derrida (1982), Harrison et al. (2001) demonstrate that discourses can be powerful determinants of what is socially acceptable, what is considered normal and viewed as correct.

Foucauldian theory proposes that discourse constructs a certain version of events which creates subjects who are then possibly subjugated by others or dependent on others (Foucault, 1979; 1983). According to Foucault, another layer of this conception of the subject is the subject's experience of subjectivity, of "being defined as an intentional being by one's self-knowledge, by one's awareness or image of who and what one is" (Prado, 1995, p. 53). In this way, discourse can be conceptualised as "constitutive of experience rather than representational or reflective" (Willig, 1999, p. 2) determining how people view others labelled in a specific way and how those so labelled view themselves.

Foucault (1979) maintains that "judges of normality are present everywhere." There are "the teacher-judge, the doctor-judge, the educator-judge, the 'social worker'-judge" (p. 304) and these decide what is normal and desirable, always being guided by their beliefs, which they have adopted because of their own perceptions of self.

These normalising judgements often include "negative assessments of individuals or groups that turn not on outright criticism or condemnation, but on invidious comparisons with a favored paradigm real or imagined" (Prado, 1995, p. 61). This again links to the Foucauldian notion of the subjects who, as individuals, might be subjugated and, furthermore, manipulated to define themselves in terms of these judgements, conceptions, and descriptions (Prado, 1995).

A further dimension of importance is the culturally-embedded nature of discourses. The social construction or conceptualisations of a phenomenon, what is socially legitimised, is influenced by culture (Durkheim, 1963; Jodelet, 1991). It is clear that if the dominant discourse is one lauding normality, then those with a disability are likely to be negatively compared with their non-disabled peers, creating the *us* and *them* scenario described in the section on inclusive education. Equally, if the discourse espoused considers disability to be part of normality, the disabled are more likely to be considered a part of *us* and to be included. This "communicative framing" provides both the disabled and the non-disabled with "a way to understand disability, and also mediates how we respond to and conceive disability" (Hedlund, 2000, p. 766). The

prevailing discourse might promote or limit their own and society's perception of the worth and capabilities of the disabled.

Foucault does not, however, see subjects limited completely to the particular conceptualisation or construction of them by others and themselves. Dreyfus and Rainbow (1983) explain that Foucault saw this subjectivity as "obviously only one of the ... possibilities of organizing a consciousness of self" (p. 175) even though Foucault sees the way that beliefs develop as being "always related to social power/knowledge structures" (Forbes, 2003, p. 151). This supports the argument that while subjects, in this case the disabled, might be manipulated by the discourse of society, they ultimately have some say in determining to what extent they will allow this manipulation.

The disabled are indeed subject to society's discourse around disability, but they have other frames of reference as well; they might be wealthy or impoverished; they might be lovingly supported within their family, seen as a mother, daughter, or son first and foremost, or they might be seen as a burden; they might be successful, inventive and creative. These constructs might have a greater or lesser impact on their perception of themselves than the construct of them as disabled, depending on to which they attribute the greatest importance.

Nevertheless, the significance of the preceding discussion for the current study lies in the fact that society has constructed perceptions and beliefs, evidenced in discourses, around disability. The discourse in relation to disabled people constructs their experiences and may, to a certain degree, also construct their identities since they do not live in a vacuum, nor are they able to live solely in society with people experiencing the same realities. They share society with the non-disabled who function within a framework of certain assumptions which are determined by discourses of that particular time and place and culture. While it may not be entirely the way the disabled see themselves, society sees them and interprets them and their reality in terms of particular discourses (Gill, 1999).

It is interesting to analyse four discourses around disability and reflect on the way that each might subjugate the disabled to a greater or lesser degree (Foucault, 1983), and how each might be more or less inhibitory or enabling for the disabled.

### **2.5.2 Moral Discourse**

The moral discourse is one where disability is seen to have a moral or religious significance. Disability in this discourse is seen as punishment for sins or as a means of redemption for others (Gill, 1999). The disabled are believed to be paying for their own sins, the sins of family members, or the spiritual consequences of others. "Cultural images have been used to socially construct disabled people as an unwelcome 'other' whose subjugation is necessary" and this is accomplished by "the use of negative imagery in the general media and in literature which portrays difference as unacceptable, evil, or a punishment from God" (Tregaskis, 2002, p. 461).

Berg (2003) notes the high level of ancestor worship and reliance on traditional medicine in South Africa. "It has been estimated that 80% of South Africa's people consult traditional healers as their first contact for the treatment of health concerns", and the "deeper meaning of much traditional healing centres on ancestor reverence" (pp. 194-195). It is likely, therefore, since disability is often considered a health issue, that some participants in the current study may have been functioning within this discourse, assuming traditional medicine works in a moral discourse.

The outcome for the disabled who live in society where the moral discourse around disability is prevalent, is that they may be feared or shunned. An extension of the argument is that the non-disabled see themselves as having no responsibility towards the integration or assistance of the disabled. This may affect their attitude towards the disabled as the attribution for the disability is on the individual or their ancestors. People with disabilities living in a society espousing this discourse could well find it more inhibitory than if they were to live in a society that espoused another discourse around disability.

### 2.5.3 Charity Discourse

In this discourse disabled people are seen as objects of pity. “Until recently, it was not thought important that disability charities should ‘represent’ as much as ‘look after’ disabled people’s interests” (Barnes & Mercer, 2001, p. 14). Often fund-raising strategies include “using images of people with impairments which are designed to evoke feelings of guilt, pity and sympathy in non-disabled people, as a means of persuading the mainstream population to make more donations” (Hevey, 1992, cited in Tregaskis, 2002, p. 465). A criticism of such organisations is that they create dependency. These organisations are overtly paternalistic and tend to compromise disabled people’s efforts to empower themselves (Oliver & Barnes, 1998).

Disabled people tend to find this discourse particularly unpalatable and patronising (Morris, 1991). Being considered an object of pity emphasises disabled people’s flaws and focuses attention on what they cannot do rather than all the things they can do. This pity aroused by people espousing this discourse is often used by beggars to elicit money. The disabled would find a society that espouses this discourse more enabling than functioning within a moral discourse, but they would find themselves being framed by their disability rather than their abilities or personality traits.

### 2.5.4 Medical Discourse

The medical discourse sees the attribution of disability to the supernatural realm recede and an explanation of disability is found in the scientific realm. In the medical discourse, outside factors are seen as secondary since the deficits within the individual are considered to be paramount. The problem is seen as primarily sited within the person who is perceived as broken or harmed. The medical model, also referred to as the *pathognomonic model* (Clark, Dyson, Millward, & Skidmore, 1995) and the *psycho-medical model* (Stanovich & Jordan, 1998), construes failure at school as resulting from some deficit or inadequacy in the student. Consequently, practitioners working within this model assess the student to diagnose the problem and the student is provided with some form of intervention or may be placed in special education. “This paradigm is

usually characterised by a focus on disabilities or impairments, with the assumption that students with particular disabilities have more in common with each other than with differently disabled students or with those who do not have disabilities” (Mitchell, 2001, p. 328).

Here, too, the individuals become defined by their disabilities and their symptoms, rather than by their personalities. The language the specialists use like “body, patient, help, need, cure, rehabilitation and its politics that the doctor knows best” (Fulcher, 1989, p. 27) could potentially be seen by the disabled to be heavily patriarchal and potentially damaging to their self-efficacy. It comes from the perspective that normality is the desired state and that disability is therefore always the problem, diminishing the quality of life. Consequently, in this discourse, the aim is to make the disabled as normal as possible by any therapeutic means even if it causes pain, stress, and degradation of the patient (Allan, 1999).

There is legitimacy in the medical model in so far as it relates to the malfunction of the body which can be remedied in some instances by medical intervention. It is when the causation is questionable, and the treatment dogmatic and not necessarily logically justifiable, that the question of the veracity of the medical model is put to the test. While many these days would discard the medical discourse in favour of a more emancipatory discourse, the medical discourse is still powerful and influential in most sectors of society.

The links to the section of the background to the study on inclusive education are clear. It was on the basis of the medical discourse that special education as a separate entity became the preferred model in education. Two parallel education policies developed as a consequence of society functioning within a medical discourse. *Normal* children would be educated in regular schools under regular education policies, and *disabled* children would be educated in special schools where specially trained therapists and educators would provide for their educational needs.

As societies began to adopt another discourse — a rights or social discourse — around disability, so we have seen the move towards inclusive education.

### **2.5.5 Rights or Social Discourse**

Self-reliance, independence, and consumer wants are the rhetoric of rights discourse. In the rights, or social, discourse it is maintained that disability has been “socially constructed in response to biological variations, just as gender and race are socially constructed categories predicted on biological deviation from the white male standard” (Gill, 1999, p. 282). The basis of the social discourse paradigm would argue that just as racism is socially unacceptable, so too is prejudice against the disabled.

This more recent direction counters the negative portrayal of the disabled in the charity and medical discourses. Within the social discourse, while the person is considered to have an impairment of some function, it is the environment that is seen to be disabling, as discussed in the section on inclusive education, which is driven by the social discourse. It follows that if the environment can be adapted, then the impairment need not be as disabling, and this is achieved in many cases in education. If the hearing impaired are provided with someone who can sign and someone who can take notes, for instance, then education becomes more accessible to them. If ramps as well as stairs are built in buildings, and buses have wheelchair hoists, then the environment does not disable the wheelchair user (Slee, 1997).

Finkelstein (2004) points out, however, that since there is some confusion around the social model of disability and there is great diversity within it, there remain unanswered questions. For instance, if the environment is the disabler, how do individuals come to accept their responsibility for their own agency? The logic of the argument would be that they would attribute their failures or inabilities to external circumstances beyond their control, which, in turn, would be inclined to be disabling to their self-efficacy. This is precisely the outcome which proponents of this discourse would like to avoid, but one which is arguably possible. In this case, it would be preferable for the disabled to accept what is real and be optimistic in that reality. As the discourse develops, such issues will, in all likelihood, become clearer.

Allan (1999) notes that the sometimes conflicting opinions place the non-disabled in a quandary as they are not sure what exactly they are supposed to feel or do to meet the needs of the disabled community. Agreeing with this, Hedlund (2000) holds that “it is an ongoing debate about principles or which determinators to use presenting the ‘correct’ understanding of disability” (p. 765). Nevertheless, it is clear to see the social discourse within society as a stimulus for the move towards inclusive education.

### **2.5.6 The Current Research and the Discourses**

Many disabled people feel that research has cast them in the role of objects to be researched, and they are often not considered equal participants in the research (Allan, 1999). They find these approaches in themselves disabling and some question whether the able-bodied should be permitted to research disabled people at all. Their catchcry is often: “Nothing about us without us” (Disabled People of South Africa, 2005). They feel matters would be improved if researchers would consider them ‘expert knowers’. If due care is not taken the disabled may feel and indeed be subjugated or exploited by researchers who engage them to gain data to use for their own ends, to publish or further their qualifications, without furthering the cause of their participants in a way that the participants expect (Appleby, 1994). They rightly challenge this oppression, but, as Oliver (1992) — an author who is disabled — argues, both the disabled and the able-bodied have a part to play in the eradication of oppression of the disabled. This view is supported by Barton (2003) who holds that in the same way that the discourse and ideologies of the able-bodied are partial determinants of the reality for the disabled, so the increasingly powerful voice of the disabled is influencing that very discourse. Consequently, according to Oliver (1992), both able-bodied and the disabled are players in the arena of liberation of the disabled. It is important, though, to heed the caveat and that we seriously consider what discourses are able to do and “attend to the features that distinguish these discourses from each other and from our own” (Shumway, 1989, p. 21).

In the interpretation of the data in the current study this was important as the differing discourses around disablement in society have caused those with disabilities to be

included in, or excluded from, everyday life depending on which ideology prevails. In the developing world, discourse may differ from that espoused by the developed world. Clearly the policy documents in South Africa reside in the rights or social discourse, but it would be quite possible that this would not find resonance with all participants, some of whom might be functioning in a different discourse.

Furthermore, it is interesting to note that while the aims expressed in *White Paper 6* fit in the social discourse, the interim short- and medium-term steps outlined fit within a medical discourse. The determination to strengthen special schools dictates this: for there to be special schools there has to be assessments of medical conditions to determine who is eligible to attend these schools. Immediately this raises issues created by labelling and the perpetuation of the *them* and *us* dichotomy, and all the reasons discussed in the section of the background to the study on inclusive education why many see the medical discourse as disempowering for the disabled and why a reconceptualist model of inclusive education is frequently preferred.

The discourse within which participants in the current study functioned, would underpin all their assumptions and beliefs, and overlay all their practices. It was interesting to consider how those who were functioning within a moral discourse, for example, would relate to education policy emanating from a social discourse. It raised questions of whether there was dissonance, and how this might potentially affect participants' beliefs and practices regarding the children with disabilities.

The current study therefore took into account

- the discourses within which the participants operated,
- that discourse fundamentally affects beliefs and practices of the disabled and the non-disabled
- that discourse can impact on self-efficacy
- that discourse promotes or inhibits inclusion in society and in education.

## 2.6 Conclusion to the Background to the Study, Gaps in the Literature, and Links to the Research Questions

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This chapter discussed in detail themes that provide the framework within which the current study took place. These were:

- inclusive education,
- democratisation in South Africa,
- regular education, special education, and inclusive education in South Africa,
- disability discourses.

In each case the current study was positioned within the theme being discussed.

While there is a plethora of research and literature available on inclusive education from a developed world perspective, there is less on inclusive education in developing countries and little on inclusive education in South Africa subsequent to promulgation of policy in 2001 on building an inclusive education system. This current study sought to address this gap in the literature. Furthermore, as noted in the background to the study, much research on inclusive education since *White Paper 6* had been from the perspective of removing barriers to learning for all students, and students with disabilities had been a marginalised group in these studies. The relatively small amount of research on how the strategies outlined in this policy document have impacted on that specific group, children with disabilities, was perceived as further gap which the current research would address.

The literature indicated that the underlying assumptions and beliefs of participants in the current study, determined by the disability discourse of the sector of society they frequent, would have a defining impact on their attitude to disability. Furthermore, as derived from the literature, the current situation in regular education, special education and the steps taken towards inclusive education to date have an impact on participants' views on inclusive education, its success and its desirability.

Addressing these issues, the **first question** in the current research was: What are participants' discourses around disability and what are their beliefs about inclusive education? Within this question lie subsidiary questions such as how those beliefs

might have been shaped by the history and discourses they have been exposed to, and what the implications of those beliefs are, which relates to question 3. Participants would include but not be limited to:

- teachers,
- parents of children with disabilities,
- aide- and service-agency workers, and
- managers and decision-makers
- children.

The current study sought to examine views of participants functioning in differing discourses about disability, to provide perceptions of participants of differing SES, and to provide insight into differences in opinion from rural and urban participants.

The second research question stemmed from the proposition in the literature that democratisation as a process has had a profound influence on all policy and consequently on all people in South Africa. It has certainly had an intense impact on all forms of education. Teachers had experienced the implementation of *Curriculum 2005* (Department of Education, 1997a) and innovations promulgated in *White Paper 6*. This policy, which articulates a desire to achieve an inclusive education system, has had an impact on regular education and on special education in the quest for inclusive education and, consequently, on the educational outcomes of children with disabilities.

The **second question** in the current research was, therefore: To what extent are the educational needs of children with disabilities being met? Children central to the study were from several contexts: regular classrooms, special schools, and satellite units. The current study sought to provide a description of participants' experiences and to seek their perceptions of how the children's educational needs were being met.

The **third question** linked to the first and second. All the themes from the background to the study: democratisation, inclusive education, disability discourse, and the current situation in education all play a role in answering the question: To what extent are the policy ideals of inclusive education as defined in *White Paper 6*, being achieved? This question embodies the notion of assessing the progress towards achievement of both the reconceptualist and incrementalist facets included in *White Paper 6*.

The following chapter discusses the research process that led to the methodology and the methods to address these questions.

### **3.1 Introduction**

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The aims of this study, based on the research questions, were three-fold. The first aim was to establish what discourse the key stakeholders espoused regarding disability and what their beliefs were about inclusive education. The second aim was to ascertain to what extent participants believed that the educational needs of children with disabilities were being met. The third aim sought to evaluate the extent to which the policy ideals of inclusive education as evidenced in *White Paper 6* were being achieved. This chapter explains the research design utilised to achieve these aims, describes the methodology adopted, the methods used to collect data, and methods of data analysis.

### **3.2 Epistemology**

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The present research was a qualitative study in which the natural setting provided the data, hence the term *naturalism* (Tuckman, 1999). Inductive analysis epitomises qualitative research, where details and specifics of the data produce important interrelationships, categories and dimensions. This “contrasts with the hypothetical-deductive approach of experimental designs” (Patton, 2002, p. 56). Isaac and Michael (1995) describe naturalism as “allowing multiple realities arising from natural differences in the development of human perception”(p. 218). Other authors agree, maintaining that naturalism is “often aligned with the interpretive” (Wellington, 2000, p. 19). For the purposes of this discussion and to avoid redundancy, the term *theory of interpretivism* incorporates the tenets of naturalism.

The interpretive nature of this present research was motivated by a belief that there is not just one reality, but that reality is “multi-dimensional and ever changing” (Merriam, 1998, p. 202), and is interpreted differently by individuals depending on their connection with the issues at hand. The aim was to “portray the complex pattern of what is being studied in sufficient depth and detail” (Ary, Jacobs, & Razavieh, 2002, p. 423) so that someone who was not there could understand the experience of

someone who was. Anderson and Arsenault (1998) describe such research as uncovering “implicit meaning in a particular situation from one or more perspectives” (p. 90).

This approach allowed the researcher to reflect continuously on the research in progress as interaction with the participants took place (Miles & Huberman, 1994) and there was “room for ongoing alteration as the research proceeds” (Bouma, 1996, p. 174). The interpretive theory on which the present research was based “is characterized by a concern for the individual ... to understand the subjective world of human experience” (Cohen, Manion, & Morrison, 2000, p. 22). Interpretivism considers realities to be multiple, and holistic (Ely, Anzul, Friedman, Garner, & McCormack, 1991) and looks particularly at the context in which the behaviour takes place in order to try and understand it.

The advantages of working within the theory of interpretism were as follows:

1. It would be possible to give a voice to the participants, to answer the questions which were spawned by the literature, and to present an interpretation of their reality within that framework. Voice was significant in this study as it sought to present the participants’ reality in their terms and within their frames of reference.
2. The participants’ contexts would in all likelihood be idiosyncratic, multifaceted, and complex. It was necessary to work within a methodological approach that produced qualitative evidence to describe this adequately.
3. The researcher was “*interested in understanding the meaning people have constructed*,” and would be able to interpret how they made sense of their world and the experiences they have in the world” (Merriam, 1998, p. 6 italics in original).
4. While the researcher guides the interview, as some specific information was sought, participants would retain the locus of control during interviews.
5. Data could be analysed and interpreted in terms of the research questions derived from the literature discussed in the background to the study.
6. Theory would begin “with individuals and set out to understand their interpretations of the world around them” (Cohen & Manion, 1994, p. 37).

In this research qualitative description methodology was used with a strong evaluative component.

### **3.3 Qualitative Description**

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The choice of methodologies in the present study resulted, in the first instance, from a desire to give maximum voice to the participants. Therefore, to achieve the first aim of the research, to ascertain participants' discourse around disability and their beliefs about inclusive education, qualitative description was used.

Some authors are quite clear on what constitutes a qualitative descriptive study. Qualitative description is described by Sandelowski (2000) as a methodology with a clear definition and purpose: "Qualitative descriptive studies have as their goal a comprehensive summary of events in the everyday terms of those events" (Sandelowski, 2000, p. 334). When straight description of phenomena is required, then, this is the methodology of choice.

According to Isaac and Michael (1995), however, research authorities "are not in agreement on what constitutes 'descriptive research'" (p. 50). Since, "within the traditional empirical science domain, description served as the crudest form of inquiry" (Thorne, Kirkhan, & MacDonald-Emes, 1997, p. 170), qualitative researchers are inclined to eschew qualitative description (Wolcott, 1992). These researchers used, in preference, one of those methodologies closely aligned to qualitative descriptive, such as phenomenology, grounded theory, or ethnography (Sandelowski, 2000).

In the now vast qualitative methods literature there is no comprehensive description of qualitative description as a distinctive method of equal standing with other qualitative methods, although it is one of the most frequently employed methodologic approaches in the practice disciplines. (Sandelowski, 2000, p. 335)

The purpose of the qualitative descriptive methodology is to "show status by first describing and then, to the extent possible, interpreting present and past situations, conditions, behaviors, interactions, events, and trends" (Charles & Mertler, 2002, p. 265). In their discussion these authors also note that the data provide information that

serves to produce increased knowledge about the research question(s). They also highlight another important aspect, that the information gained by this type of research “may frequently provide a basis for decision making” (Charles & Mertler, 2002, p. 265) by stakeholders when the results of the research become known. This is a form of reciprocity and, certainly, participants in this current research were intent on receiving feedback and incorporating the findings of this research as a basis for reflective practice.

Artinian (1988) emphasises the importance of participants’ voices, noting that qualitative description “is used to present a detailed description of what is happening in some setting or with a particular group of subjects, so that the point of view of the subjects can be understood” (Artinian, 1988, p. 138).

In any qualitative research there is, however, an element of interpretation by the researcher. Wolcott (1992) holds that the presuppositions of the describer inevitably influence that which is described and he warns: “Feigning ‘immaculate perception’ (as it has lightheartedly been called) is another affection to avoid” (p. 41). He highlights here that researchers wishing to describe a particular circumstance select from an array of possibilities what they will describe. The beliefs, attitudes and inclinations of any describer influence the resultant description (Griffiths, 1998).

While acknowledging the point made by Wolcott (1992), for the current study qualitative description provided the opportunity to “describe and then, to the extent possible, interpret present and past situations, conditions, behaviors, interactions, events, and trends” (Charles & Mertler, 2002, p. 265). It allowed the discovery and understanding of “a phenomenon, a process, or the perspectives and worldviews of the people involved” (Merriam, 1998, p. 11). It allowed the data to be presented so that the participants’ point of view can be understood and made explicit (Artinian, 1988). Furthermore it could “provide a basis for decision making” (Charles & Mertler, 2002, p. 265). In order to avoid the negative connotation of “posturing” but rather to adopt a well-considered “posture” (Wolcott, 1992, p. 4) regarding methodology, and since “straight descriptions of phenomena” (Sandelowski, 2000, p. 334) were desired, qualitative descriptive methodology was adopted.

To summarise, in order to achieve the first aim of the research, to ascertain participants' discourse around disability and their beliefs about inclusive education, qualitative description provided the best means to derive this information whilst also giving the participants maximum voice.

The second and third aims of the study were to describe participants' perceptions of the effectiveness of programmes and interventions provided for students with disabilities, and their evaluations of the translation of educational policy into practice. To achieve these aims, elements of process evaluation were adopted.

### **3.4 Evaluation within Qualitative Description**

Evaluation embeds the notion of judgement, whether one is referring to the subjective assessments people make informally during the course of their everyday lives, or whether one is referring to formal evaluation defined as "disciplined inquiry" (Lincoln & Guba, 1986, p. 550). Clarke (1999) refers to evaluation where there is collection and analysis of information about outcomes and structure of programmes, interventions, and projects. The intention in evaluation research is to study what existing knowledge has caused relevant programmes to look like in practice. The evaluation component of the current study was providing participants' evaluation (Cousins & Earl, 1995) of the process of implementing inclusive education.

In discussing the importance of evaluation, Isaac and Michael (1995) note that educational evaluation is vital in assisting decision-making when choices are made between alternative practices. Furthermore, it provides validation for improvements in educational policies and practices, and protects against the wholesale implementation of innovations that may be fashionable, but not necessarily fundamentally sound. In the current research, the validation of some practice and participants' experience provided a platform for decision-making in the schools where the research took place and in the wider context as well.

Denzin and Lincoln (2003) hold that “programme evaluation is a major site of qualitative research, and qualitative researchers can influence social policy in important ways” (p. 38). Indeed, many support the view that educational evaluation can play a pivotal role in decision-making by policy developers (Ely et al., 1991; Norris, 1990; Stufflebeam et al., 1971). Participants in the current research were optimistic that their views, recounted by the researcher to policy makers at their request, would play a role in improving future policy and practice for the education of children with disabilities.

A focus on process in the current study involved “looking at *how* something happened rather than or in addition to examining outputs and outcomes” (Patton, 2002, p. 159) since the implementation of inclusive education was in its initial stages. This author goes on to note that, typically, the experience of process varies and it is important to capture participants’ experiences in their own words; also that “participants’ perceptions are key to process consideration” (Patton, 2002, p. 159).

In summary, having an evaluation emphasis in the qualitative description methodology provided the best means of ascertaining participants’ views on the extent to which disabled students were having their educational needs met. It also allowed for an evaluation of the extent to which the policy ideals of inclusive education, as evidenced in *White Paper 6*, were being achieved.

### **3.5 Methods**

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Four methods were adopted for data collection. These were document analysis, observation, focus group interviews and individual interviews. In this section, the methods are described; details of how these were applied follows under the ‘research process’ heading (3.11).

First, in order to have a good understanding of current government and provincial policies, it was necessary to analyse policy documents prior to undertaking fieldwork. These documents were not coded and analysed as data; rather they provided the platform for discussion in the interviews as a key issue was the participants’ perception

of whether policies were in reality becoming an actuality for them. Second, observation played a part in data collection. Third, working qualitatively, the major methods for gathering data were focus group and individual interviews. Opinions, perceptions, and priorities of the participants were sought and confirmed in individual interviews. Alternatively, if individual interviews preceded focus group interviews, data from individuals could be expanded, elucidated, or focussed in focus group interviews. Because of the desire of some participants for anonymity, it proved, in some instances, more desirable and ethically responsible to hold individual interviews.

### **3.5.1 Document Analysis**

Cohen et al. (2000) consider documents which are “original to the problem under study” (p. 161) to be primary sources of data. In this study, the documents analysed were South Africa’s policy documents on education and special education, and would be considered primary sources.

Patton (1990) explains that a rich source of data about many programmes is the documents surrounding them. In this research they had a twofold purpose:

- providing a “basic source of information about program decisions and background”, and
- providing the researcher with a basis for knowing what might be “important questions to pursue through ... interviewing” (Patton, 1990, p. 233).

Clarke (1999) points out that while many government documents and reports are easily accessible and in the public domain, “there is restricted access to some unpublished government papers” (Clarke, 1999, p. 84). This was the case in the current research with one (Department of Education, 2003) document which had been prepared by the Human Sciences Research Council (HSRC) and which, although ostensibly in the public domain, was not on the website, and was only available to be read in their offices. It could not be purchased or borrowed. The manager with whom the researcher conversed, allowed for one photocopy of the document to be made, some of which is used in the discussion later in this thesis. While no rationale was provided for this lack of transparency, it might be that the document included evidence that would not be

advantageous to the government had those figures been freely available to the public, more specifically figures showing that targets of lower student to teacher ratios were not being met.

The major informative documents in the current research which were analysed prior to data collection and which helped formulate the questions for which answers in the field were sought, were:

- *Report of the National Commission on Special Needs Education and Training (NCSNET) and the National Commission on Education Support Services (NCESS)*(Department of Education, 1997b),
- *Curriculum 2005* which presents the new non-racial curriculum for South Africa through Outcomes Based Education (Department of Education, 1997a)
- *Consultative paper no. 1 on special education: Building an inclusive education and training system* (Department of Education, 1999),
- *Draft education white paper 5: Special education: Building an inclusive education and training system* (Department of Education, 2000),
- *Education white paper 6: Special needs education: Building an inclusive education and training system* (Department of Education, 2001).

These five were selected as they reflect a progression culminating in *White Paper 6*. The first one (Department of Education, 1997b) reported the findings of NCSNET and NCESS which had completed initial research and put forward suggestions for the education of children with disabilities. This information was included with input from other stakeholders as a consultative paper (Department of Education, 1999) which was provided for comment and feedback to all stakeholders. Building on that feedback the *Draft white paper* (Department of Education, 2000) was developed and again provided for consultation before the final *White Paper 6* (Department of Education, 2001) was promulgated.

These documents were used to frame the general outline of the focus group and individual interviews.

### 3.5.2 Observation

Observation is a principal component of all research methods in the behavioural and social sciences (Adler & Adler, 1994). During interviews in the current study, observational techniques were utilised to record body language lending meaning to the spoken words. Research assistants noted gestures and evidence of emotion while recording initial words of each participant in focus group interviews, which assisted with coding the data after transcription.

Descriptions in Appendix a include “observations in the natural setting ... rendered as descriptions” (Angrosino & Mays de Perez, 2000, p. 674). In order to develop such descriptions and “achieve a workable balance between participating and observing” (Wolcott, 2005, p. 89), the researcher kept detailed fieldnotes and, where permission was granted, research assistants took videos and photographs.

It was important to investigate participants’ understanding of the situation the researcher observed so that their “inferences [could] become part of *my* arsenal of facts” (Wolcott, 1994, p. 170 italics in original). To this end, observation linked with focus group and individual interviews.

### 3.5.3 Focus Group Interviews

Patton (1990) describes focus group interviews as “open-ended interviews with groups of five to eight people on specially targeted or focused issues” (p. 173). Thomas (1998) notes that focus group interviews make it easy for participants “to amplify their answers or to digress from the central topic in ways that prove useful to the investigator” (p. 134). A prerequisite, of course, is that participants have “certain common features” (Wellington, 2000, p. 124). Homogeneous groups might be seen to be less threatening to participants, and so might be better if the topic is at all threatening. In the current research, separate interviews were held for parents, teachers, aide workers, and managers, ensuring common ground for participants within one focus group.

A focus group interview is not a discussion with the aim of solving a problem or making a decision (Patton, 2002). Rather, it is an interview where participants reflect on a question or issue raised by the interviewer, and express their opinions whilst often adapting, refining, or expanding these as they hear other participants' points of view (Bogdan & Biklen, 2003). Wellington (2000) agrees that "members of the group, brought together in a suitable environment, can stimulate or 'spark each other off'" (p. 125). It is possible not only to gather individual views and opinions, but also to gain greater depth of insight due to the synergy generated within the group (Anderson & Arsenault, 1998).

While Patton (2002) is more explicit about the difference between a discussion and an interview, other authors use the word *discussion* to capture the atmosphere that ideally should prevail, emphasising the non-formality of the experience for participants. "A focus group is a carefully planned and moderated informal discussion where one person's ideas bounce off another's creating a chain reaction of informative dialogue" (Anderson & Arsenault, 1998, p. 201). Describing the format of a focus group interview, distancing it from a formal interview, McNiff, Lomaz and Whitehead (1996) explain there is "a starting point and an objective but no set agenda of questions" (p. 10).

### ***Possible weaknesses***

Whilst there are tangible benefits or strengths in using a focus group approach, there are also some possible weaknesses. For example, Bogdan and Biklen (2003) note the following:

- participants may be chary of recounting important experiences in a group situation,
- some individuals may dominate by talking too much, and
- it can be that discussion strays from the topic.

Supporting this view, Fontana and Frey (2003) note, further, that reticent participants must be encouraged to participate so that each participant's perceptions are gained "to ensure the fullest coverage of the topic" (p. 73). However, care should be taken that participants do not feel coerced into expressing views they do not agree with so as to

not distance themselves from the group. Anderson and Arsenault (1998), too, caution that focus group interviews need careful planning and skilled implementation, and “are effective only if used properly” (p. 208).

Further weaknesses of focus group interviews mentioned by Patton (1990) are the relatively limited number of questions that can be addressed in the given time, and the difficulty of taking notes whilst at the same time running the interviews. He goes on to say that “good notes help in sorting who said what when the tape recording is transcribed later” (Patton, 1990, p. 336).

Despite these possible weaknesses, focus groups in the current study provided evidence that would allow all three aims of the current research to be achieved.

#### **3.5.4 Individual Interviews**

Individual interviews, one of the most widely used methods of obtaining qualitative data, were used to augment focus group interviews in the present study. These accommodated participants who preferred the confidentiality of an individual interview or those for whom the time of a focus group interview was not convenient. Through an interview it is possible to ascertain a participant’s views, thoughts, values, beliefs, attitudes, feelings and deductions (Ary et al., 2002; Bell, 1999; Wellington, 2000). While the topic under discussion was generally pre-determined, open-ended questions were used in individual interviews so that participants explained their views and opinions from their frame of reference. The purpose was to discover individual participants’ beliefs and practices within their own situation, and their evaluation of educational provisions for children with disabilities. The interviews were informal and allowed participants to determine what aspects they deemed most important. The desire was to capture the individuality and complexity of participants’ varied experiences and beliefs.

##### ***Possible weaknesses***

As with any method, the limitations of interviews as a research method need to be

recognised at the outset. Cognisance needs to be taken of power relations within any interview. The less formal the interview becomes and the more subordinate the role the researcher plays, the wider the repertoire of responses the participant is likely to provide. This can allow participants the freedom to identify their own priorities. Scott and Usher (1999) note that irrespective of the type of interview, “gender, race, class and other types of power relations are conveyed by the researcher and form an essential backdrop to the answers that respondents provide” (p. 109). Participants may try to provide information and attitudes they think the researcher is expecting, and may omit information if they think it would run contrary to their perceived notion of the researcher’s attitude to the topic.

### **3.6 Ameliorating Steps Taken in the Current Research**

Given the limitations, the way these potentially detrimental affects were addressed in the current study included, but was not limited to:

- using the participants’ home languages of isiZulu, Afrikaans, or English in the initial stages of the interview,
- culturally appropriate practices such as providing food and an opportunity to mix and mingle prior to the interview taking place,
- having isiZulu first language speakers as research assistants,
- providing the opportunity for participants to have an aide support worker present who was known to them and who had advanced counselling skills, and
- while foci for consideration were pre-determined this neither negated the role of the participants having a central locus of control, nor did it preclude them from extending the foci for consideration. Additional potential factors were noted, and the specifically designated space for new data/probes reflected the desire to allow the participants to move from existing knowledge to new data, themes, and perspectives, potentially contributing to new knowledge.

### **3.7 Sampling Design**

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Since the major aim of the present research was to ascertain the views of adults concerned with the education of children with disabilities, these adults were the participants. “Qualitative inquiry typically focuses in depth on relatively small samples, ... selected *purposefully*” (Patton, 2002, p. 230 italics in original). It was important to select information-rich sources, and the careful and deliberate choice of participants in the current study exemplified *purposeful* or *purposive* sampling (Miles & Huberman, 1994). These authors explain that samples in qualitative studies “are usually not wholly prespecified but can evolve once fieldwork begins. Initial choices of informants lead you to similar and different ones” (p. 27). In the present research, established information-rich participants knew of others closely related to the phenomenon under study who could be approached; these then knew other possible participants and the participant sample grew, epitomising snowball sampling. Snowballing also ensured that the selection of participants was not unduly controlled by the researcher. The disadvantage of snowball sampling is that it can result in a skewing towards including like-minded individuals rather than spanning a spectrum of views. In the current study it was possible to compensate for bias to a large degree by utilising selection by quota constraints, which ensured that participants from appropriate groups were included in the sample.

### **3.8 Design For Data Analysis**

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McCracken (1988) observes that “every qualitative interview is, potentially, a Pandora’s box generating endlessly various and abundant data” (p. 12). While Kvale (1988) mounts a telling argument against amassing vast quantities of qualitative data, in the present research this was weighed up against interview precedents which have been established by researchers such as Lortie (2002) and Goodlad (2004) in studies of American teachers where they interviewed large numbers of participants. The present research was guided by the premise of data saturation and ended up with about 300 pages of transcribed interviews to analyse. This initially seemed daunting, but the inductive process of developing theory from qualitative data can be likened to a

funneling in that the range of data is initially wide and only narrows through the process of theory emerging.

### 3.9 Coding

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Coding is a complex process by which the researcher labels units of meaning within text according to a system of codes, usually developed through a close reading of the data, often likened to indexing a manuscript. This enables the researcher to generate questions in interaction with the data, and to discover core categories which lead to theory generation. In addition, coding allows the researcher to fracture the data thereby reaching higher levels of abstraction by seeing the data in different groupings (Miles & Huberman, 1994).

In the first instance, the data were read in order to discover codes, categories and emergent themes. This overview approach has been described as “dwelling on the data” in that the researcher becomes immersed in the text and worlds of the research participants as a way of reflecting on interesting strands in the data. It is not unusual at this stage of data analysis for “themes, metathemes and higher order abstractions to emerge” (Tesch, 1987, p. 235). Certainly in this research, the experience of reading the data yielded a rich variety of initial clusters of data.

These initial clusters, during early immersion in the data, included effects of poverty, discrimination, and the prevailing notion amongst some teachers that knowledge is a fixed given, imparted to students in a way, which epitomised a transmission theory of education (Deacon & Parker, 1996; Freire, 1972). From these themes, additional themes were generated as further interviews took place.

Initially data analysis appeared to be a non-sequential, non-chronological and unpredictable process. Later the researcher became more adept at employing the technique that Richards (2005) likens to using a zoom lens and the data analysis began to approach the structured step-by-step movement towards “higher and higher levels of theoretical abstraction” described by Miles and Huberman (1994, p. 92). The technique described by Richards (2005) is a process whereby detail is considered

carefully when the researcher zooms in because something seems interesting and then zooms out again when considering why it is interesting and links are made to themes and metathemes. With *trees*, *nodes*, and *coding* the terminology of NVivo software suggests an ordered system wherein chunks of data fit neatly into stable classifications. Having agonised over diverse meanings of a word, multiple meanings of a phrase, even a pause, the data analysis in the present research was a far more tentative and nuanced undertaking, as Tesch (1987) explained:

Categories function somewhat like a filebox. The filebox metaphor, however omits a crucial attribute of the process; the image is too tidy. Things don't fit into slots that neatly! Some themes overlap, and could be sorted into more than one category. For others the borders are fuzzy, and they are not clearly distinguishable from one another. (p. 233)

The use of NVivo software facilitated the approach which Tesch (1987) referred to as “panning” which entailed searching for “precious elements in a text” and marking those “specks of gold” (p. 235). It proved an effective way of staying open and intuitive in the endeavour to *hear* the voices of the participants in the ocean of words which constituted each transcript. The “unique idiosyncratic ways in which the phenomenon manifests itself” (Tesch, 1987, p. 233) could be identified as well as the common themes. At this point, the researcher consulted Dr Pat Bazeley, an expert in the coding technique, in a confirmatory role to ensure reliability of the coding process.

Next, line by line analysis, described by Tesch (1987) as “surveying”, was employed. This coding involved investigating “every square inch of territory” and trying to “capture what is there, making sure that nothing important is overlooked” (p. 235). So that the finer points of the interview data could effectively be analysed, categories, named in a set of nodes, were developed. The identification of coherent set of nodes required that the researcher work with the tension between immersion in the data, and detachment from it (Richards, 2005), so as not to get so lost in the minutiae as to lose the conceptual framework.

With many of the sub-categories being cross-referenced, this process allowed the discovery of theories across themes. So, for instance, a participant who mentioned resourcing issues could also have that section coded to poverty if that was relevant.

Using NVivo, a segment of text can be coded to several different nodes, probably under different trees, allowing fracturing of the data. (See Appendix e which is a sample transcript of an interview with a sample of attendant coding). Using queries allowed the researcher to reconnect them in various ways in analysis. In many instances a descriptive code could be interpreted analytically, and vice versa.

Then came intensive analysis using the advanced functions of NVivo which allow the researcher to view the coding, explore nodes, and develop conceptual models with the nodes. Analytical memos written as initial impressions were gained, could be linked to make theoretical sense out of comparative data and allowed consideration of contradictions within the data. The analytical memos in this present research were prompted by collaborative reflection as well as the researcher's individual reflection, by miscellaneous conversations, both informal and official, and by ongoing reading of the literature around the emerging themes.

### **3.10 Validity and Reliability in the Current Research**

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Validity "requires that the results accurately reflect the phenomenon studied" (Morse & Richards, 2002, p. 168). Explaining what reliability is, Cohen et al. (2000) hold that if research is to be reliable, "it must demonstrate that if it were to be carried out on a similar group of respondents in a similar context (however defined), then similar results would be found" (p. 117).

Because qualitative research is interpretive, it is by definition subjective. The research is situated in both context and time. Individual perceptions determine what are considered facts, and what is truth is deduced by the researcher from a particular viewpoint.

To achieve validity and reliability in qualitative research Morse and Richards (2002) maintain that rigour at all stages of the research is key, and highlight the following:

1. rigour in the design phase by working from the strengths of the researcher, having a comprehensive background to the study, working inductively, and using appropriate methodology and design,
2. rigour while conducting the research by using appropriate sampling methods, being responsive if strategies are not working, synchronising data collection and analysis, and coding reliably, and
3. rigour when writing up by providing an adequate project history and audit trail, and in linking findings to the literature.

### **3.10.1 Rigour During the Design Phase**

The researcher travelled “circles within circles” (Ely et al., 1991) in the design phase before arriving at a decision about which approach would provide the most useful data, within which theory this study should be completed, and which methodologies and methods would be appropriate. Care was taken to ensure that there were strong ontological, epistemological, and methodological links as described in the previous section. The embryo and final construction of the research questions were founded on a solid base of the literature in the background to the study.

### **3.10.2 Rigour While Conducting the Research**

The sampling (purposive and snowball) encompassed isiZulu, English, and Afrikaans speaking participants, rural and urban participants, and high, medium, and low SES participants. Within the sampling and time constraints of the data gathering phase, as many participants as was necessary to reach data saturation were accessed.

There is evidence of being responsive if strategies were not working. The original plan had been to use focus group interviews to gather initial data, and then to follow these up with individual interviews with key informants. What had not been anticipated was that so many of the parents would happily take part in an individual interview, but did not wish to participate in a focus group interview. For this reason, in some instances,

initial perceptions would be gained in individual interviews and these were then tested in focus group interviews.

### **3.10.3 Rigour While Writing Up**

Data collection and introductory analysis of data were synchronised. This could be achieved by completing initial broad brush coding of data on NVivo software during data collection to establish initial trends. The researcher alone did all the coding. Reliability of coding was considered, and considered inappropriate in an interpretive method in which the researcher needs to be absolutely immersed in the literature theory and data to be able to interpret what people were saying and what that might mean. The synchronisation of data collection and analysis provided the ability to “not only store materials but also to store ideas, concepts, issues, questions, models and theories” in the design stage (Morse & Richards, 2002, p. 80). It allowed memos and annotations to link to the data, promoting early and emerging reflections to be stored for consideration as the data came in and as analysis proceeded.

## **3.11 The Research Process**

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### **3.11.1 The Consultation Phase**

The consultation process with prospective participants and with authorities in education in KZN, South Africa, was begun in 2003, before the study took shape, to ensure context specific relevance. From the outset it was evident that it would be vital to give due consideration to the differing expectations and needs of different cultural groups within KZN. It was necessary to establish first of all whether they would welcome being part of a research project together with the researcher. They were definite in their acceptance of this offer and determined the direction of the research. They wanted a study to be undertaken on children with disabilities. Having the idea initiated by prospective participants allowed the power to reside with them and provided them with a sense of ownership.

### **3.11.2 The Field – Part One**

Between November 2003 and mid February 2004 the researcher spent ten weeks in KZN completing focus group and individual interviews.

#### ***Recruitment of participants***

Participants were recruited through schools, through aid agencies like the Down Syndrome Association of KwaZulu-Natal, the Cripple Care Society, and by word of mouth from other participants as snowball sampling occurred.

Having established contact with some aid agencies, they notified clients of the possibility of participating in this current research if they wished. Information sheets with details of focus groups times and venues were provided to potential participants through the aid agencies (Appendix b).

Teachers and parents who participated were given information sheets with dates and venues of further interviews which they passed on to contacts whom they thought might be interested in participating. Thus, having used purposive sampling to make initial contact with some participants, snowball sampling proved most effective in making further contact. Extra information sheets were included in each offer to potential participants so that they could give them to friends or colleagues who may be interested in participating. Word of mouth is a strong vehicle in a dominantly oral culture.

#### ***Sampling***

The sample of participants was both a purposive sample, and a sample selected according to the following selection constraints:

1. Participants were drawn from a predetermined geographical area, namely Pietermaritzburg and its surrounds.
2. Participants had defined relationships with disabled children: they were parents, educators, aide workers, or people in some way responsible for policy or practice of the education of children with disabilities.

3. The participant pool included rural and urban participants.
4. Participants were drawn from a range of ethnicities.
5. Participants from a range of SES were included.
6. Teacher participants represented both regular and special schools.

If a focus group was organised for a particular date and time, those potential participants who could make it at that date and time were included. Others were offered another opportunity which they could accept or reject.

### *Participants*

Participants were drawn essentially from four groups of people: parents of children with disabilities, teachers in regular and special schools, aide workers, and management personnel. The children themselves, forming a fifth category, were included in a few instances when they accompanied their parent or parents in individual interviews. Overall there were 64 participants. These comprised teachers ( $n = 35$ ), parents ( $n = 11$ ), children ( $n = 5$ ), management personnel ( $n = 7$ ), and aide workers ( $n = 6$ ).

In the teachers' category, recorded as T1 to T35, were special educators ( $n = 17$ ) and teachers at regular schools ( $n = 18$ ). The management category, recorded as M1 to M7, included two principals, one vice-principal, a director of academics at a large secondary school, a manager of further studies for the Chamber of Mines who had been part of the education policy writing party from 1990 to 1994, a person who took a leadership role in a SIDA funded study on inclusive education in KZN, and the Chief Education Specialist who was a leader in the unit for programmes for children with disabilities in KZN at the time of the current study.

The Aide workers category, where participants were recorded as A1 to A6, included a teacher aide, a speech-language therapist at a school for the deaf, a remedial teacher, two occupational therapists at schools for children with intellectual and physical disabilities respectively, and a school psychologist attached to a special school.

Teachers and management personnel from ten schools, five rural and five urban, were interviewed. These represented a range of socio-economic backgrounds as depicted in table 1 below. Five of the interviews with teachers and management personnel were focus group interviews; the rest were individual interviews.

Table 1

*Demographic Information on Schools Used in the Research*

School Name	Rural/Urban	Regular/Special	Co-ed/ Girls/Boys	SES: High/Middle/Low
School A	Rural	Regular	Co-ed	Low
School B	Urban	Regular	Girls	High
School C	Urban	Regular	Boys	High
School D	Rural	Special	Co-ed	Low
School E	Rural	Special	Co-ed	Low
School F	Urban	Special	Co-ed	Middle
School G	Urban	Regular	Co-ed	Middle
School H	Rural	Regular	Co-ed	Middle
School J	Rural	Regular	Co-ed	Low
School K	Urban	Regular	Girls	High

In all there were 64 participants, 42 of whom took part in focus group interviews. The other 22 participants took part in individual interviews or small group interviews where both parents were present, or where one parent and the child were present. One participant was the parent of a disabled child and a teacher as well.

Parents of 16 disabled children were interviewed, recorded as P1 to P11. In one instance the grandmother was raising the child who was an AIDS orphan, and she was included in the parent category. P6 and P7 were both parents of one child (C6), and one mother was responsible for seven disabled children. Consequently 11 parent participants represented 16 disabled children. Children were largely the unheard participants, but five of them did participate. Of these sixteen children whose parents were interviewed, 12 were Black and four were White. Five children were physically

disabled (four Black and one White), five were intellectually disabled (two Black and three White), and six were both physically and intellectually disabled (all Black). All parents were the same ethnicity as their children except one White parent who had seven Black disabled children whom she fostered or had adopted. Table 2 shows the ages of the children whose parents took part in the study.

Table 2

*Age of Disabled Children*

0-6 years	7-10 years	11-14 years	15-17 years
4	6	4	2

Parents of four of these children took part in a focus group interview, three families had small group interviews with both parent or parents and the child present, and the rest chose to have individual interviews.

*Ethics and the current research*

Ethics approval was gained from Auckland University of Technology Ethics Committee (AUTEC) (Appendix c). Furthermore, the Head of the School of Education, University of Natal, Professor Michael Thurlow, who verified that the ethics requirements of the University of Natal were fulfilled, was a local person participants could contact if they had queries or concerns about the project. His contact details were provided to participants on the participant Information Sheet (Appendix b).

Potential risks to participants were considered, and as far as possible, were controlled for. These included:

- Provision for privacy is detailed in the Information Sheet (Appendix b) for potential participants.
- When participants phoned in to register to participate in a focus group interview, the researcher consulted with them to see if they had any concerns, or if they could identify any potential risks.
- Participants had the opportunity to withdraw (as detailed on the information sheet) if at any time they did not wish to continue.

- When parents were discussing their children who have disabilities, they may have become upset because it was an emotional issue for them. If they so chose, a member of an aid agency was present who had advanced counselling skills to offer support, and who, in many cases, was well known to the participants.
- In any research, issues of power need to be considered, and it needs to be acknowledged that there are power implications when a White researcher is involved with many participants who were Zulu. Scott and Usher (1999) note that “gender, race, class and other types of power relations are conveyed by the researcher and form an essential backdrop to the answers that respondents provide” (p. 109). Where possible and appropriate, particularly in the initial stages of the interview, the medium of isiZulu was used to reduce this power differential. Two Black research assistants with isiZulu as their first language assisted with this aspect as well. Culturally-appropriate protocols were followed throughout.
- When parents of children with disability were part of the focus group interview, a cultural support person was present whom they chose, if they so wished, such as the aid agency worker through whom they were accessed as participants.

Informed consent was gained, and the signed participant consent forms (Appendix d) form part of the documentation for the research. In the information sheet participants were made aware of the purpose of the research, what their participation would entail, the degree of anonymity they could expect, who was eligible to participate, what risks and discomforts might ensue, and what the potential benefit would be.

The Information Sheet was given to participants at least a day prior to their being asked to sign the consent form. Opportunity was provided for participants to ask questions before they signed. For isiZulu or Afrikaans speakers, all information was provided orally for them in their preferred language. Where applicable culturally-appropriate protocols were followed, such as providing food and a general time of getting together to socialise before the focus group interview began.

Some participants expressed gratitude for the opportunity to participate, while others expressed the opinion that it had been an enjoyable experience for them. Indeed, contact has been maintained with some of the schools which chose to participate, and with some of the parents. The possibility of participants feeling manipulated, as described earlier by Fontana and Frey (2003), seems not to have been the case.

### ***Data saturation***

The principle of data saturation was applied. Essentially this was when new data caused no more surprises and you “know you have gathered enough information” (Padak & Padak, 1994, p. 4). As explained by Patton (2002), you have reached a point of redundancy. This occurred more quickly with managers, aides, and parents than with teachers who had more to offer on what they perceive as the problems and successes in regular education as well as with the policy and practice of inclusive education. There were, therefore, more teacher participants than other groups.

### **3.11.3 The Field – Part Two**

By May 2005 data analysis was complete and clear themes had emerged. It was vital that the researcher return to the participants with the findings to this stage to see if they found resonance with what was being written, and to note any dissonance or further aspects which they considered important but which had not, to their mind, been sufficiently highlighted.

In June and July of 2005 the researcher therefore spent five weeks in KZN meeting with those participants who were able to be contacted. The researcher met with some participants (teachers, aides, and managers) from nine of the ten schools which had taken part in the study. E-mail contact was made with the tenth school. With the teachers, managers, and aide workers the profile which had been written describing their school, its advantages and challenges, and their views on inclusive education, was discussed. With parents, the findings were discussed within a framework of comparing and contrasting policy intentions and the realities as they had described them, noting too the evaluative aspects that had been highlighted.

### **3.11.4 Role of the Researcher and Assistants**

This current research is based on the premise that the research represents a view from “somewhere”. The researcher is a White middle-class urban academic from a university in New Zealand who has current and historical links with the South African education system, having worked for some twenty years in KZN schools. The construction of the realities of parents, teachers, and the children is shaped by personal history and experiences. As a result an “omniscient, scientific, all-seeing eye, a view from ‘everywhere’” (Jessop & Penny, 1999, p. 216) is not presented. Rather the engagement with the participants and their perceptions and aspirations are set forth as best the researcher can understand them from the present reality within which she stands. The dominant narrative of education and society provides the framework within which the participants’ views, as they described them, are interpreted. The frame of reference for the participants’ voice is fashioned as much by the researcher’s presence as an insider-outsider as by their insider knowledge.

Research assistants were used for cultural and linguistic facilitation only. All interviews were personally controlled and carried out by the researcher.

### **3.12 Conclusion**

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This study investigated what participant groups’ beliefs were about disability and inclusive education. It investigated to what extent participants thought the educational needs of disabled children were being met and it evaluated the extent to which the policy ideals of inclusive education as evidenced in *White Paper 6* were being achieved. This chapter described the research design utilised to achieve the aims of the study as well as the methodology and methods. Sampling used in the current study and the design for data analysis, were then described, as were validity and reliability. The research process was made explicit, including ethical considerations and the role of the researcher, and finally a description of the participants in the current study was provided.

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## 4.1 Introduction

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The methodology and methods used in the current study produced a wide and rich array of data. These have been refined and scoped to components that provide insights into the aspects the research questions addressed. This chapter, therefore, encompasses a description of the findings of the study in three sub-sections. First, the conditions in KZN at the time of the current study are described. Second, the strategies, actions and interactions surrounding the implementation of education change are reported, including how these relate to those conditions. Third, consequences of the conditions and the strategies and actions are presented.

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## 4.2 Conditions at the Time of the Current Study

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### 4.2.1 Rural Dimension and their Schools

#### *The reality of rural poverty*

It is tempting for developed world urban-based observers to romanticise rural life, especially if they visit the rural location briefly and in good weather. It is easy to be charmed by the picturesque vision of kraals made up of quaint thatched dwellings nestled on rolling hills. To be beguiled by this impression is to ignore the struggle that rural communities in KZN encounter on their way to modernity. Generally, children struggle down uneven dirt tracks to neglected school buildings and the women still carry heavy plastic containers of water or bundles of firewood on their heads. To survive, families and communities use the children to assist at harvest time even though they are deeply committed to the tantalising future they know lies in the education of their children. It is an uneasy truce.



*Figure 1. Rural KZN is picturesque, yet the realities of living are harsh*

The following exchange, including two aide workers at one special school, portrays the reality for many:

A3: What we see quite a lot is babies who seem to be alright for the first few years of life, but then slowly started having problems at school and so on. And if you look at that child, often you can see there's a dullness. It's malnutrition, I think, and in many cases it's contributing to learning problems at school.

R: Kwash<sup>1</sup> babies?

A2: Kwashiorkor ... and they come into our early intervention clinic which we run once a month and see if they're diagnosed with Kwash. Like there's this one mom who has to survive on the R160 (±\$35NZ) a month per Kwash child that she has and she has only two, because the oldest children are considered okay and they won't pay anything for them yet. Social circumstances are dire, and she couldn't afford her oldest three children who are 5, 6, and 7. So she just left them and went off. So at the clinic we try and help these kids, um, and initially I was really cross, but then I thought I can't really judge her. You know, she's got no food [*pause*] she's dependent on someone and if she's got to sleep with him to get the food well, then that's what she's got to do. Um, terrible thing. And now she's got a baby who's delayed because of no food, and the closest support agency is in Martizburg and they don't serve this area. The mission up the road will provide food parcels sometimes but that is food suitable for an adult, not suitable for a baby. So it's very, very difficult. Basic nutritional needs... and with our HIV babies it's worse. They really need the basic nutrition — adequate nutrition.

A hallmark of rural areas is their inaccessibility. Roads and tracks become treacherous

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<sup>1</sup> Kwashiorkor (kwash) is a disease caused by malnutrition.

in the rainy season, and some schools, such as School J, have no road to them. The difficulty of finding schools, even with the aid of a map, is reflected in this excerpt from the researcher's fieldnotes:

The map and the instructions we had been given concurred as far as the first turnoff from the Pietermaritzburg — Bulwer road. Then things got a little messy. The instruction to “continue for 20 minutes until you see a forest on your right” turned out to be too loose. 20 minutes at what speed? It rained last night and the road was dreadful. I am so grateful to have a 4-wheel drive vehicle! And as for the forest on our right, well, there are forested areas all along the way. It turned out to be 30 minutes and the turnoff we were seeking was the one resembling a quagmire! (Fieldnotes, dated 04/12/03)

Inaccessibility also probably accounted for less intrusion but also less assistance from the authorities.

### ***Resource deprivation affected schools***

#### ***Overcrowding***

Schools in the rural areas portrayed neglect and poverty and there were insufficient classrooms. Figure 2 shows the children working in cramped conditions. All teachers at low SES schools in the interview sample agreed with this challenge which was aptly explained by participant T7:

It is hard to deliver the curriculum with the many children, and then the ones who have difficulties, we can't always help them. It is hard to deal with them in such a classroom with such huge numbers. If we had more classrooms the numbers would be more manageable. (Transcript 4)



*Figure 2.* A section of the 68 students in a grade 8 class at School A

In classrooms constructed to house 35 children, many more had to be accommodated.

Consequently it was not possible for all students to write at their desks simultaneously. There simply was not room.

#### *Basic facilities inadequate*

School facilities at the regular school in the rural areas were basic. Only one school had a staffroom; running water or electricity and toilet facilities for both students and staff were variable, as described in the *A tale of two schools*. Playing facilities were non-existent, at best a rough patch of veldt covered in tussock grass that children could use to play soccer. During breaks they chatted or played tag.

#### *Security*

Teachers in the research sample from rural schools lamented the lack of security and the level of theft. At one school the farmer, on whose land the school (School J) stood, had used his staff and provided the wood necessary to build another much needed classroom. He pre-cut the timber and delivered it to the site but a busy fortnight with his stock precluded him building the new room immediately. On his return two weeks later to begin construction, all the wood had been stolen, probably used as firewood.

#### *Resource issues and their consequences impacted on professionalism*

Teachers' professional development in such settings could be considered a luxury, as described by the teacher at School J where she had to pay her own way to attend courses. Violence before and during the 1994 elections had abated over the following decade but had not been eliminated. Fear for their own safety is aptly described by T7 who held: "It is hard to be enthusiastic and to want to try all the new things when you do not know if you are going to be alive next week" (Transcript 4). The debilitating conditions in poor schools permeated all aspects of teachers' professionalism. At the time of the study, historical inequities in the distribution of resources persisted, with rural schools continuing to suffer resource deprivation. For some it was explained in terms of their being Zulu and the ANC not providing equitable funding to KZN because of the lack of political support for the ANC by some parts of KZN. For others there was a sense of disillusionment as they did not see the changes materialise for them or their students that democracy had promised. These teachers believed there might be changes in other provinces, but not in KZN where they had "seen nothing

[pause] there is a lot of talk, but no doing" (T6, Transcript 4). The advent of democracy was experienced differently by different sectors of society.

#### *Efficacy of teachers*

Whether the class sizes and lack of classrooms were in fact defining aspects or not, many teachers attributed their reluctance to implement OBE or inclusive education to the overcrowded classrooms. This is interesting in light of attribution theory (Weiner, 1985, 1995) where external attribution over which they have not control led to decreased motivation. In some instances, notably in some urban middle SES schools, teachers attributed their self-efficacy less to external factors. These teachers had greater belief in the effectiveness of the education they were able to offer their students in equipping them to succeed in the modern world. They were optimistic about the government's promises of electricity, tar sealed roads, and sufficient classrooms, but this was secondary to them. They believed that they were even then equipping their students to meet the demands of participation in a modern economy, and that these students would reap the rewards. The impact of poverty was less undermining in these schools, possibly because the level of poverty was not as intense as in some rural areas, and the physical facilities were better. Furthermore, the closer they lived to the city the better was the hope of employment.

### **4.2.2 Urban Dimension and their Schools**

#### *A mix of SES*

While School C of *A tale of two schools* was representative of some urban schools in KZN, with affluence and excellent examination results, it is not true to think of a dichotomy which contrasts rural poor with urban wealth. In Pietermaritzburg were low, middle and high SES schools. The privileged Whites only schools under the apartheid regime had all integrated and students of any race were permitted to attend them. Some, like School C, had retained the same ethos, standards and aspirations they held pre-democracy. This had been accomplished by the schools' ability to charge substantial school fees. Students unable to pay the fees would be less likely to gain entry as these were sought after schools which were easily filled with students able to

pay the fees. Some of these schools managed wealthy trust funds which enabled them to augment the resource provision and staff allocation from government.

Other schools adapted and changed as the demographics changed in the area where the school was situated. School G, for example, a previously Whites only school, had, at the time of the study, only ten percent White children. Their school fees were less, and not all students were able to pay school fees. This was classified as a middle SES school.

Also falling within the boundaries of urban Pietermaritzburg were what were previously called the townships in the apartheid era, where Blacks had to live. At the time of the study, these were suburbs of Pietermaritzburg. The schools there were previously Blacks only schools and most of them were still 100% Black. Many of these schools also served the vast informal settlements, sometimes called squatter camps, that surrounded the city as shown in figure 3.



*Figure 3.* In the background is the city, in the foreground an informal settlement

#### **4.2.3 Special Schools**

Three special schools, which took part in the current study, were comparatively well resourced with specialist services. The physical and human resources at the schools were appropriate to the needs of the disabled children attending them. The following were evident:

- ramps providing wheelchair access
- toilets with wheelchair access
- boarding facilities especially designed to cater to the needs of wheelchair users

in toilets and showers and with wheelchair access throughout as shown in figure 4.



*Figure 4.* Morning tea at a school purpose built to accommodate wheelchair users

- sufficient Braille machines for visually impaired children
- space in classrooms to accommodate wheelchairs
- desks constructed to be ergonomically compatible with wheelchairs as shown in figure 5



*Figure 5.* Sufficient space to accommodate wheelchairs in the classroom and desks large enough for a wheelchair user to find them comfortable

- qualified physiotherapists with designated space and necessary equipment
- qualified occupational therapists with designated space and necessary equipment
- qualified audiologist with audiology machines so that hearing could be tested and hearing aids fitted for hearing impaired children
- qualified teachers at the 'school for the deaf' who could all sign

- FM transmitter for the teacher and decoders for the hearing impaired students enrolled in a class where the auditory-oral method was being trialled, as shown in figure 6.



*Figure 6. Students provided with hearing aids and decoders*

- qualified speech language therapists, and
- qualified educational psychologists.

School D served children using wheelchairs or crutches permanently as well as those who were visually impaired. As far as the curriculum was concerned, all those who were able to succeed had accommodations and adaptations made to the curriculum ensuring they kept pace with their peers at regular schools. If suitable adaptations had been made to the environment, particularly for those with visual impairments or disability necessitating wheelchair use, students progressed well academically.

If students had specific learning difficulties as well as their physical impairment, there was remedial teaching available to the students to assist them, after which they were re-introduced to the academic classes. If students were not able to cope with the academic stream, they were enrolled in a skills programme which provided them with the skills to create saleable items at roadside stalls and markets, which is how many people in KZN survive. In a province where unemployment was in the region of 40 percent for able-bodied people, teachers considered it more useful for these students to be provided with a means to be self-employed rather than to follow and fail an academic curriculum which would probably lead to unemployment for them. Figures 7, 8 and 9 show the ways that people can make a living by being innovative and

creative.



Figure 7. Beadwork, to be sold in Denmark, completed by children in the skills department of a special school



Figure 8. Vendor stirring the *putu*<sup>2</sup> she is selling at the roadside stalls



Figure 9. Cars and figurines fashioned from Coke and other cold drink cans for sale at a market, together with carved wooden souvenirs

A school for deaf children reported that a small percentage of their students passed the

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<sup>2</sup> *Putu* is porridge made from maize

matriculation examination, but that many did not. Part of the reason for this was that many of these children did not get hearing aids until they came to school, nor did the parents and other family members learn to sign. Consequently, these children were mostly developmentally delayed with extremely limited language skills when they entered schooling and the deficit was seldom made up. This school was therefore trialling the auditory oral method with an intake of students to see if this would assist them more than signing. Teachers at this school lamented the fact that they were compelled to use English as the medium of instruction (see summary for School E in Appendix a for a fuller explanation) as they felt that it inhibited the students' acquisition of language.

The third special school, which catered for children with severe intellectual disabilities, had sufficient supports and dynamic leadership which enabled them to meet the needs of the children in a happy, stimulating environment that was enjoyed by teachers and children. Elements teachers valued, such as manageable class sizes, teacher aide support, and strong collegial support, are encapsulated in this excerpt between the researcher and two teachers during a focus group interview.

T30: You asked about the classroom, the number of pupils. I think we all range between sixteen and eighteen. That is more or less what the class numbers are, and then depending on the abilities of the class, we either put a full-time or a part-time assistant that helps them in the classroom.

R: I mean, we walked around, and we were just so struck by the, sort of that intangible thing that you have at some schools, where it's just such a happy place to be. So how do you get that right? Because it's potentially not a happy place to be.

T32: Ja, well, um, you know people comment on it actually. We actually pour out love. I think, I don't know what T (T28/P4) feels? She has come from another school. She has been with us for six months. We pour out love which takes a lot of energy from us, onto our children. But also I think because we accept the children for who they are and for what they are. We don't expect things that they can't do. And we set firm limits in that. I mean it's not a free-for-all.

T28/P4: And what I have discovered is that the love that is given to the children, is given to the staff as well. Here it is just like a home [pause]. It is just like a family. A very happy family. We have birthday parties here. We share.

T29: And when one of us is in trouble, everyone runs around you. I am talking from experience. Ja, I mean trouble at home or financial or whatever. Everybody runs around and helps.

The atmosphere of purposeful engagement and contentment on the part of the students at this school was palpable.

#### **4.2.4 Disparity of Provisions**

The stark contrast in *A tale of two schools* and the provisions described at the three special schools leads to the issue of why the disparity of provision had not been reduced in the decade since democracy. Other important aspects such as providing all communities with infrastructure, the drain on government coffers because of HIV/AIDS, and the attempts to curb violence had meant that government resources were stretched thinly on many fronts.

In addition to those aspects, there was a strongly held belief, raised by both parents and teachers, that there was inequitable funding from government for KZN. Consequently, when the opportunity arose, the issue was taken up by the researcher with a fairly high-ranking *National* Department of Education representative of why there was this perception amongst some people in KZN. This person explained that funding for all departments — health and welfare as well as education, for example — were provided to KZN in a lump sum. He felt that although in the government's plan a certain sum was allocated for education, it was not absolutely earmarked as such, and that the local *provincial* government might have allocated more to another aspect, cutting what the national government had intended for education. The example he gave was that the HIV/AIDS epidemic is worse in KZN than in some other provinces and he suggested they might therefore have decided to allocate more to the health budget than had been provided by national government for health, thereby cutting the amount available for education.

In search of published statistical information that would substantiate this claim, it transpired that while the statistics were ostensibly in the public domain they were not available on the web, nor did the Department have a copy that could be borrowed. The

Human Sciences Research Council, which had its head office in Johannesburg and which had been involved in the data collection and statistical analysis, had one copy in the reference section of their library, which could not be taken out. When it was mentioned that the particular government official in question had claimed the statistics were in the public domain, they did agree to one photocopy of the document being made. This was the Department of Education (2003) document reflecting statistical data from 1999 to 2001. In this document it showed that the perceptions of the teachers in KZN were correct in that KZN had the greatest number of students enrolled of any of the nine provinces, and their student/teacher ratio, together with Mpumalanga province, was highest at 36:1. The comparative data demonstrated that advances had been made. In 1999 Gauteng had the lowest student to teacher ratio at 29.1:1 and KZN was then highest at 37.1:1. By 2001, Gauteng was up to 30.7:1 and KZN down to 36.3:1 (Department of Education, 2003). Even though the gap was closing, the disparity was still marked.

Armed with the statistics and the response from national government, the discussion was continued with the KZN departmental official. He maintained the statistics were flawed for three reasons. First, many of the enrolments from the deep rural schools were not included since the postal services to deep rural schools and back to administrators were almost non-existent. He held that there were, therefore, many more students attending school than was reflected in the statistics. Second, he maintained there were many more thousands of children of school-going age out of school than reflected in another part of the statistics. His reason for this claim was that it is impossible to do an accurate census in the deep rural areas and also in the informal settlements. He explained that at census time a helicopter flew over and photographed the area; then a certain number of people per square centimetre of photograph was allocated and the population was worked out on that basis. His contention was that the estimation of total population was woefully below the reality. Third, he maintained that Durban and Pietermaritzburg were the two fastest urbanising cities in the world with the influx of people from rural areas and with refugees from Mozambique. Illegal immigrants, particularly, would not appear in the statistics.

The outcome, he explained, was that schools would take students until they simply

could not fit any more in, and then they would turn students away. Many school aged children were then not able to access education at all. Furthermore, he agreed with the drain on the budget from HIV/AIDS, citing again the incorrect total from the census which meant that the KZN health budget was trying to serve far more people than funds had been allocated for, and he concurred with the view that the HIV/AIDS problem was worse in KZN than in most other provinces. Certainly according to the statistics the number of teachers in KZN had declined by 500 between 1999 and 2001 (Department of Education, 2003), and it did indeed seem likely that the total population in KZN had increased substantially in that time. It was likely that the resource crisis was indeed more acute in KZN than elsewhere in South Africa.

#### **4.2.5 A Crucial Social Factor: Ostracism of the Disabled**

Participants in the current study represented a range of SES, and those of low SES represented the majority of the population in KZN. Their concerns regarding ostracism of the disabled reflected the prevailing beliefs of many in society at the time of the current study. The reality of stigmatisation was emotively expressed by all participants. The segments coded at this node included the following words used by participants: ostracise, shame, ridicule, tease and shunned, the result of which was fear. High SES parents never once used these terms; they were used only by middle and low SES participants.

##### ***Ostracism leading to fear***

The high levels of ostracism of the disabled were mentioned by all participant groups, but it was parents and children who expressed the fear they felt as a consequence of the ostracism.

Parent P9 noted that she would prefer a special school for her son because of the stigmatisation prevalent in what might be termed her milieu. This is readily explained in terms of the non-disabled functioning within the moral discourse (Berg, 2003; Gill, 1999; Hedlund, 2000). This parent would rather that her son be in a special school where all were disabled rather than risking his wellbeing in a regular school. She

explained: “You see what we are afraid of, we are afraid of the other children. They will hurt him, they will tease him all the day. He will feel ashamed” (Transcript 19).

Another parent, P4, expressed the same fear in different words:

No really, especially my child, I don’t feel she would benefit from the mainstream (inclusion) because she doesn’t know a lot of things that they (peers) are talking about. Most of the things that they talk about are very abstract and she doesn’t understand, so I don’t believe that the other children, the mainstream children [pause]. They look at them like a sort of animals, you know, especially in the playground. (Transcript 10)

This parent considered that her child’s educational needs were not likely to be met in an inclusive setting, but more important for her in the decision to choose special education, was the fear of her child being treated like an animal. The ridicule by peers and ostracism by teachers was a reality noted by regular and special educators and aide workers. Participants who collaborated closely with both parents and teachers, found that parents feared for their disabled children’s safety, as explained by a specialist aide worker at a special school.

Our experience of the regular schools is that they’re just as intolerant as ever about children with disabilities. Many, mainly a half of the parents who bring their kids here, say they would have liked their child to be at a mainstream school but because the staff are totally intolerant of having a child with a disability, they can’t. The children at school are not being educated to not tease children with disabilities. So the teasing continues, the ostracism by the teachers continues. Very little has changed in that respect so I don’t think that many children are voluntarily choosing mainstream. (Transcript 6)

While legislation heralded the movement towards an inclusive education system, it is not possible to legislate for changes in beliefs, and certainly P4 and P9 clearly found that such policy was ahead of what their society was able to embrace, hence their preference for special schools for their children.

#### *Fear: The children’s voices*

Fear of ridicule and abuse was apparent in data from the children as well. The following conversation took place between the researcher and C8, a child from a low SES family who was included by default at her local regular low SES school. This child had a form of cerebral palsy that affected the left side of her body. Her parents had not informed the school on her enrolment that she experienced some difficulties and she

had been allowed to remain at the school. No accommodations were made for her.

C8: The other children, they laugh at me because I am slow.

R: Have you got friends to play with?

C8: The children don't want to play with me because I can't run and do the things that they can do, and I can't talk properly.

R: But you can read?

C8: Yes, and I am good on the computer. We have the computer at our school. I will have a job with the computer one day. (Transcript 19)

It is interesting to note the resilience of C8 in this exchange and to get a sense of her self-efficacy despite feeling excluded by her peers. While this efficacy was domain specific, relating to her computer skills, she had identified where her capabilities were valued. She was prepared to invest in this aspect and to pursue a job in the future, built on her strengths. This substantiates the view (Dreyfus & Rainbow, 1983; Foucault, 1983) that even in debilitating situations such as living with the effects of poverty, people are not necessarily passive victims of circumstance. This child's agentic capabilities were sound and she was not being incapacitated. The option of special education, which was not free, was simply beyond the means of this family which lived in extreme poverty and they were pleased that she was permitted to attend her neighbourhood school.

These were not isolated incidents. The following poem, written by the 14 year old brother of a younger physically disabled child, reflected incidents he had seen and conversations he had heard. The fear experienced by the disabled and their families, as a result of people living within a moral discourse, is patent. He chose to write in the first person as though he were his disabled brother:

## STICKS & STONES

Inspector came to school, Mother. He asked them about me.  
What did Inspector ask, Child?

He asked about attendance Mother; why I came not to school.  
Saw he not the club-foot, Child?

I told him of the club-foot, Mother, and the pain to walk to school.  
It surely is a heavy thing, my child.

I told the same Inspector of the stones they threw at me.  
What did Inspector say, Child?

He asked after the throwers of the stones they threw at me.  
What did you say, Child?

I said not for I fear them, those that threw the stones at me.  
It is a heavy thing, Child.

I heard Inspector say, Mother, another to another.  
What another did he say, Child?

Fatalistic. He said " ... fatalistic ... ", Mother. What kind of stick is that?  
It is a grown-up word; worry not for now, Child.

Fatal! It means dying Mother. Is it stick for killing?  
Fear not. It is the will of the spirits, Child.

Do they know how they kill me with their laughing, Mother?  
Eesh! Do they know, Child?

John wrote it.

### *Ostracism as seen by other participant groups*

These sentiments were supported by several teachers who, in focus group interviews, noted stigmatization within society as a reason to perpetuate special schools. Teachers noted that the attitude of society at large, particularly those functioning in a moral discourse, resulted in stigmatisation of people with disabilities. Teachers at both

regular and special schools were clear on the negative impact such ostracism would have on the students. The following exchange at a focus group interview with special educators aptly demonstrated this:

T20: But honestly, my honest opinion is at the age that they (disabled children) are, it is very fair that they are secluded in a place like this because unfortunately there still, unfortunately in our country there is still stigmatisation attached to disability.

T19: Yes. Society is not yet educated enough to accept. I would also say that at the age that they are, it is better if they are in a place like this. Then when they grow up they are mature and can stand whatever they need to.

T22: In our country, I must say, it's not just the children in the mainstream schools who are not ready for inclusion. Even the teachers themselves. They actually don't want to have anything to do with these children. (Transcript 5)

In an individual interview with a person who had been part of the education policy writing party for the ANC between 1990 and 1994, the reality of the slowness of change in beliefs and attitudes is clearly expressed:

The prejudice is still there, and it's not going to [pause] it's not going to happen overnight. And these are some of the realities facing us. People think, I am one of those people who believe that if you, if you, if you oppress people for 40 years and above, when you give them independence on year 41, they still feel oppressed. You know, it's, it's going to be a process. The expectations are extremely high, after the transformation in 1994. However, because the country is in a state of imbalance anyway, it's not going to be possible for us to balance those inequalities even in a period of ten years. With that kind of paradigm, take it into a Black community where we amongst ourselves, as Black people, were ostracising our own fellow Black people who are disabled, you see, simply because we have an attitude that they can't do anything [pause] simply because he's sitting on a wheelchair, or because he's on crutches, you know, and, and, that that has been part of our life. And all of a sudden we are saying to this young man who wants [pause] who is aspiring to be a teacher. All of a sudden he has passed his matric, he is going to university to go and get a teachers certificate, you say to him 'now you are going to teach the disabled'. How are you going to get it right? You will not easily overcome a prejudice he has lived with his whole life. (Transcript 17)

Into this educational, financial, and social climate, the government introduced first *Curriculum 2005* (Department of Education, 1997), which necessitated the innovations inherent in OBE, and which was rolled out starting in 1998. Then in 2001, inclusive education was introduced.

### **4.3 Strategies, Actions and Interactions**

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At the time of the study, in the ten years since democracy, teachers at regular schools had been introduced to a new Grade 1 – 9 curriculum, which replaced the curriculum that had been used under apartheid, to OBE, and most recently to inclusive education.

The literature indicates that certain elements are prerequisites for the successful implementation of OBE. Key elements are:

- trained and retrained teachers (Capper & Jamieson, 1993)
- a change in teaching style to achieve critical as well as specific outcomes (Jansen, 1998) which is contingent on classroom organisation that facilitates group interaction, assessment, and monitoring (Capper & Jamieson, 1993), and
- support for teachers, such as there being smaller class sizes, aide support and additional planning time (Brady, 1996). These aspects are considered in the findings on resource issues (4.2.1).

The current study investigated what participants' experiences had been with the implementation of OBE with regard to those aspects. Responses from a variety of SES schools, and primary and high schools were compared.

Participants across the board were positive and supportive about the change of curriculum away from the race-based curriculum that existed pre-democracy, particularly in those schools which had been Black only before democracy.

#### **4.3.1 Change to Teaching Practice with OBE**

Part of the investigation into OBE considered what participants' views were of change to practice required by OBE as this was seen as incorporating all the elements of good teaching that are necessary for inclusive education.

### *High and middle SES schools*

T34 was a special educator at a regular middle SES primary school. Hers was the lone voice amongst all the participants in being supportive of OBE. She critiqued the attitude of many teachers:

T34: These teachers think their schools are working. "We actually don't need OBE what we're doing is fine" (said sarcastically). But what they are doing is actually the behaviourist approach, which went out 30 or 40 years ago. Interesting, a recent survey [*pause*] a friend of mine who is a subject advisor who is running OBE courses had a person from US Aid who is observing to see how transformation to OBE is taking place. And his comment was "It's as though these schools have never tried OBE".

All other high and middle SES teacher participants were negative about OBE, and expressed confusion about what OBE actually was and about how its implementation would impact on practice. This parallels the findings of Jansen (1998) who investigated teachers' change of practice with OBE. This study found that teachers had largely not effected any changes to their practice.

### *Rural poor schools*

Teachers at rural poor schools were unanimous in rejecting OBE. Many teachers expressed views similar to that of T5.

T5: It is hard to make changes to the way you teach. We still make use of the choral method, often, because we are used to it and the children expect it. To do the OBE way when we are not sure what it is, and what to do [*pause*] it is easier to do our way (referring to the choral method). It is hard with the huge numbers to have the individual contact that they say OBE needs. And the students at our school do well. (Transcript 4)

The radically different assessments required for OBE and the focus on critical as well as specific outcomes (Fakier & Waghid, 2004) were not occurring as teachers preferred to continue with their practice of choral teaching. There had also been no clear modelling of how teaching with the implementation of OBE would look. Furthermore, these teachers felt that their current practice was ensuring good results for their students who were achieving well. They had little motivation to change to, for them, untried and untested practice, especially when they were not clear what the expectations were with this initiative.

There was a strongly held belief that FP was the only possibility if teachers were to be successful and students were to learn and achieve well in examinations. Factors influencing a rejection of OBE among teachers at low SES schools included:

- Life history. When they were at school, these teachers had been taught by teachers who believed in transmission of knowledge through the choral method. Those who did have teacher education had not been encouraged to explore different pedagogies.
- Overcrowding. Class size was deemed to be the key factor in determining pedagogy. Teachers could not see their way clear to having small-group work and tuition with the large numbers of students in their classes. Certainly, the smaller class sizes recommended for successful implementation of OBE (Brady, 1996) were not achievable in many schools.
- Lack of physical resources. For an alternative pedagogy, teachers knew they would need classroom organisation that facilitates group interaction, assessment, and monitoring. Physical resources at low SES schools did not support this.
- No teaching aids. With no electricity at rural schools and no libraries, the research-based inquiry learning using the scope of technology and libraries, envisioned by OBE, was not achievable.
- Competence anxiety. Teachers expressed the anxiety the literature suggests is expected whenever there is educational change (Cross et al., 2002; Fullan, 1991, 2003; Nakabugo & Sieborger, 2001). They maintained, as did their peers in high and middle SES schools, that the documentation had been difficult to understand.
- Lack of qualifications. Many primary teachers had limited or no teacher qualifications.
- Nature of knowledge. The general belief of these teachers was that knowledge is fixed. Consequently there was a dependence on text book authority. Teachers in this part of the developing world had been educated within a paradigm of transmission of knowledge and therefore believed knowledge to be fixed, not evolving, and the text book (often the only book in the classroom) was accepted as holding all the answers. This is contrary to OBE where the learning outcomes included the critical outcomes of meaning making, critical understanding,

critical analysis, logical formulation, and decision-making (Janse van Rensburg & Potlane, 1998).

- Collaboration with parents. This is an important aspect if the implementation of OBE is to be successful (Singh et al., 2004). All teachers in low SES rural schools found that collaboration with parents was an ongoing problem where the parents of their students were living in poverty. Many of the parents were illiterate and possibly as a consequence did not offer to assist in classrooms, nor take part in collaboration initiated by the school. First, they were struggling to survive and often did not have time and energy to invest in their children's schooling. Second, they did not consider their opinion to be of any value since they were generally illiterate. Indeed, even if teachers requested a meeting with particular parents to discuss their child's progress, in their experience the parents did not come.
- Fear and insecurity. These teachers' experience of violence in their daily lives caused them to be fearful and to feel insecure about maintaining control in classrooms. They feared that a change of pedagogy from the choral method would lessen their control over students.
- Low morale. For teachers living in rural areas, where the promises of democracy seemed not to be becoming reality in their lives outside of school, morale was low and this was carried over into their role as teachers.
- Student expectations. Students, whose parents had been taught by the choral method and who had experienced this method thus far, expected that it continue.

#### **4.3.2 Changing Roles within Inclusive Education**

Not only did teachers in regular schools need to change practice to implement OBE, there were further expectations with the implementation of inclusive education. In addition, inclusive education policy necessitated the change of practice for special educators and those in leadership positions such as in Psychological Services as well.

### *Psychological Services*

The role of Psychological Services was not a predetermined aspect to be investigated in the current study and was not raised in any of focus group interviews. In five of the individual interviews, however, when the theme of changing roles came up, the role of Psychological Services was critiqued spontaneously by two teachers and three parents.

The following case examples are representative of the view of all the participants who raised the issue of the role of Psychological Services which would need to be redefined within the framework of *White Paper 6*.

#### *Case A*

Participant A6 was the remedial teacher at School B, a regular private school, where a child had been successfully included for four years. Thinking they were doing a helpful thing, the parents organised a psychological assessment for the child, assuming it would assist teachers with planning and the setting of goals. The following exchange between the researcher and A6 demonstrates the power of Psychological Services and the huge responsibility that they bear as a consequence.

A6: K (disabled child) repeated reception class here because she was very immature. She was 9 when she finally left our school. She was very immature and limited in ability, and poor speech [*pause*]. Generally she was very lacking in ability. But she had been included and loved by the children in her classroom, her teachers. Although she was a very trying child — she kept disappearing and wandering off and being very friendly to anyone who was passing by! (Laughter) But while they found her tiring, she was a very dear child and loved by the whole school. And was included in class assemblies and all the activities, swimming and drama and the whole works. But she was actually not allowed to stay on at our school, she was FORCED to go to, um, (special) school.

R: But I suppose as a private school you can do as you want?

A6: We actually had no say, it was decided [*pause*]. We were very concerned!

R: When who decided?

A6: It was decided by people who have a little more authority than we do.

R: Like?

A6: I won't mention names on [*pause*] (indicating the recording device).

R: No, not names just their designation if you're happy to give that.

A6: Um [pause] special education people [pause] Psych Services. She MAY NOT go here any more.

R: So they have that power?

A6: Yes! And after not having met the child at all! No-one saw her here, how well she was doing here. Much as we were concerned about her, management of her as she went higher. But the decision was made, taken out of our hands.

R: Without consulting you?

A6: There was consultation, a little bit, with the parents, not much with the school at all.

R: No? And you as the remedial teacher in particular?

A6: Not at all. (Transcript 11)

From this exchange it is evident that Psychological Services, in this instance, was not executing their services within an inclusive framework and what this school experienced worked counter to inclusive education in practice. Assessment of a child by a stranger outside the familiar learning environment runs contrary to best practice in assessment. From this special educator's description, the decision was made after an interview with the parents only where her capabilities at age nine were discussed. The focus had been heavily biased towards academic prowess, and not towards social or cultural needs which are considered to be of equal importance in an inclusive framework (cf. Alton-Lee, 2003; Baker et al., 1994; Bennett et al., 1997; Giangreco & Cravedi-Cheng, 1998; Hornby, 1999). There had not been the sort of collaborative decision-making with teachers and parents as well as para-professionals that would epitomise inclusive education.

#### *Case B*

Child C6, from a middle SES family, entered special education through one Occupational Therapist's report when he was four years old, "by mistake almost; by a quirk of fate" (P6, Transcript 15). All along, the parents had felt, on the strength of psychological assessments and their own observations, that their child was of average

academic ability. He did have coordination problems caused by low muscle tone and poor fine motor control. When he started at this special school, the intention was to get students from this special school back into regular education after two years of intense remediation. The change of government saw the amalgamation of regular and special education departments to one education department catering for all students. As a direct result of this, the designation and philosophy of this special school changed and there was no longer the intention to re-introduce students into regular schools within two years. It became designated as a resource school, not a full-service school. With the strengthening of special schools as determined in the 20 year plan of Education *White Paper 6*, this school was no longer seen as a stepping stone for students and the parents had not been able to have C6 replaced into regular education, despite their best endeavours. As explained by another parent:

Because once you're in the special class you stay in the special class, you don't get out of it. You stay special (Transcript 14).

For the following reasons, the parents of child C6 wanted their son removed from the special school he was enrolled at:

- Lack of information. They had found that the information provided for them about their son's condition was insufficient, unspecific, and rarely related to his academic progress.
- Disregard for disability. Cutting out the *spider sums*, for example, took him all day and he never got to the sums themselves. It was precisely because of OT problems that he was at this special school. His sister who is not disabled and was in regular education had her spider sums stuck into her book by the teacher. The following excerpt highlights these parents' frustration:

P6: I said I want the worksheets, and I'll do the cutting out. Give me all the work for the next couple of weeks and I'll make sure it's cut out and stuck in the book, so he can get down to the *work*. And she (teacher) said, 'when do you expect me to make worksheets, three o'clock in the morning?' (Transcript 15)

- Unrealistic expectations. There was a sudden expectation that the children learn all their times tables in one year. The learning of times tables was considered too difficult for these children the previous year by their teacher that year and then all of a sudden he was expected to learn all of them. By contrast, again, C6's non-disabled sister learnt a few each year which the parents found more

manageable for the child. They queried why disabled children would be expected to do something not expected of students in regular education.

- No individualised programme. The parents described the absolute refusal on the part of the teacher to individualise the programme for C6. The teacher preferred to do whole-class preparation and whole-class teaching. This, the parents felt, ran counter to the needs of the children particularly in a special school where it was even more likely that there would be diversity of ability.

This “interval of intense uncertainty” (Bratton & van der Walle, 1997, p. 10) had caused substantial changes in this school’s purpose. As a result of their experiences the parents had lost faith in the education their son was receiving at this school. It is irrelevant whether these perceptions of the parents were founded or unfounded. What was germane was the policy and the reality experienced by them. Government, working within a human rights framework, had promulgated laws intended to protect and enhance minority rights which would move towards seeing children with disabilities included in regular classrooms. P6 and P7, therefore, tried to get this to happen in practice, as P6 described:

The school simply didn’t seem to move towards getting C6 moved to the special class at (local regular) school. But I got hold of the *White Paper*, and the *White Paper* actually says that you can choose the school that you want your child to go to. Those are the rules. So when we quoted that they were almost freaking out, really. Then we demanded another assessment. But, um, so eventually we kind of insisted. So eventually educational services or psychological services came and this woman said, ‘Don’t do anything, just leave it to her’. And she phoned and said, ‘No, it’s fine. She has spoken to the local school, she’s spoken to the special school where the child was. It’s fine.’ And then two days before we were going to start, they rang and said no, they’re full. Because psych services had fought the path, and, you know, said they’re only allowed twenty- two in a class, all grades. And so we had to go back to the special school (laughter). After telling the school to go jump, we had to go and say, oh sorry. Eat humble pie. (Transcript 15)

These parents had seen the special class at the regular school as a stepping stone towards getting their son included in a regular class at that school. The implementation of policy intended to enhance minority rights, in this case, was working counter to the wishes of the parents and the best interests of the child, in their view. It was clear to see the power of psychological services, a relic of the previous separatist education

policies, still apparent. Parents' views on the misguided power of psychological services coincided with that of teachers. While the policy documents heralded a move towards inclusion, there were still clear delineations between regular and special education, enforced by psychological services, limiting the envisaged flow, depending on need and ability, between the two. This reluctance to support inclusion could, indeed, be justified by psychological services in terms of the 20 year plan (Department of Education, 2001) because of the conflicting philosophies within the one document. The policy seemed to work against parents such as P6 and P7 and the remedial teacher in Case A who were wanting to have those children included in regular education. There did not seem to be a clear pathway for administrators, paraprofessionals, and parents to follow.

### *Expectations*

While this is a persuasive argument, it begs the question why, if participants in individual interviews critiqued the role of Psychological Services, this was not raised in focus group interviews. This probably has more to do with current role than the type of interview. Both teachers who raised the issue of Psychological Services were remedial teachers at regular schools and perhaps had different expectations from those regular and special educators who took part in focus group interviews. Special educators were consumed with their own possible change of role. Regular educators, on the other hand, were probably not affected by decisions made by Psychological Services as they had so few disabled children and it was, therefore, arguably not an important feature of their lives. These teachers were more focussed on their view of what inclusive education would mean for them as regular classroom practitioners.

### *Special educators*

The literature notes the reluctance on the part of some special educators to leave the seclusion and security of their known field of special schools to embrace new roles in the inclusive setting (Barton & Smith, 1989; Burnstein et al., 2004; Fisher et al., 2003). The special educators in the current study were opposed to inclusive education and the question needs to be raised as to whether there was also an unspoken and unacknowledged reluctance on their part to change, or whether it was rejection that was conditional on funding, resourcing and support.

Certainly, the lack of clarity surrounding roles at this period of change was distressing to special educators. One special school, which was part of the study, described in 2004 the unsettling years they had experienced. In 2001, with the introduction of *White Paper 6*, the first notification from the education department intimated that their school was going to be closed down in line with the new policy of inclusive education. Teachers had not been provided with any information about their job security nor what would happen to the severely physically disabled students who attended their school.

In January 2004, as part of this study, two focus group interviews were held at that school: one with class teachers, and one with aide workers including a physiotherapist and a school psychologist. At that time, the school had recently been informed that it was no longer to be closed down, but that it would be one of the resource schools described in *White Paper 6*. The classroom teachers were relieved to have their job security clarified, but they were concerned about the services they would be expected to provide. As they understood it, they were to be expected to complete all they were currently doing and, in addition, offer training and support to the regular teachers at full-service schools in the area, which would be including disabled children in their classrooms for the first time. They found this prospect extremely daunting. For example, they explained that if a physiotherapist were to optimise the effectiveness of their knowledge and skill with severely disabled children the ratio should not exceed 6:1. At this school they were trying to cope with a ratio of 16:1 which was proving to be ineffective for some students. As it was a boarding school and students were therefore on campus at all times, these staff were voluntarily working extended hours to accommodate all the students in smaller groups. Instead of fitting them all into the school day, they took smaller groups and worked late into the evening for no reward other than providing the best service they could for their students. Such was their commitment. To be told that they were additionally going to be expected to provide services to even greater numbers of students included in full-service schools, and to train staff at those schools, seemed to them to be too onerous to contemplate. The morale of these professionals in early 2004 was extremely low. An occupational therapist from that school expressed the futility they felt:

So I don't know. We might be out of line but we are finding that the standard of

education has dropped dramatically in rural schools, definitely. The teachers are not doing their jobs because the class numbers haven't improved, teachers are demoralised. Teacher morale is the worst it's ever been, definitely. And then we get these children with huge academic gaps as well as their physical disabilities, and we'll do our level best to fix them, but now? How do we do all this and service the full-service schools too? (Transcript 6)

These teachers, who provided clear evidence of their dedication, indeed exhibited a reluctance to embrace new roles but not, as the literature suggests, because of lack of confidence in their ability, nor concern about moving outside their comfort zone. Their reluctance was not rooted in diffidence about their self-efficacy. Rather, it was rooted in a belief that *nobody* could fulfil the new role satisfactorily nor meet the new expectations. Most important of all, for them, was the welfare of their students and other disabled students if these initiatives were not implemented with sufficient supports for them to serve these students well. The reluctance of these special educators to embrace change stemmed from a concern for the quality of education to be offered to disabled students, not from a desire to serve their own interests.

#### **4.3.3 Recent Research into Inclusive Education**

Research on inclusive education subsequent to 2001 had mainly taken place within the reconceptualist model depicted in the overarching aims of *White Paper 6*. Analysis of these findings shows that in the quest to identify barriers to learning, to address and eradicate them which would be expected within the reconceptualist model, it was not possible to get past resource issues such as toilet facilities and leaking roofs and the impact of the HIV/AIDS pandemic (Muthukrishna, 2000; Muthukrishna & Sader, 2004; Muthukrishna & Schoeman, 2001). These were, indeed, barriers to learning for large numbers of students and, in getting funding to improve school facilities, positive gains were made. Addressing the HIV/AIDS pandemic, with dissemination of information as the top priority, was another really vital issue. Indeed, one participant, who was leading one SIDA funded project noted, "Well, at the end of two years the Danish Government was extremely pleased. They said it was the most successful project they ever funded in Africa" (Transcript 18).

The focus of this current study was students with disabilities, however, and the tentative inquiry as to that focus within the SIDA study elicited the following conversation:

R: But as well as gender, AIDS orphans, you know, that wider definition...

M5: Everything, HIV/AIDS [*pause*] and the project was that wider definition. So we have various, um, if you look at the materials achieved, it's definitely not disability. It's, um, child abuse, child bereavement, all that barriers to normal education.

R: Having been now with the parents and the teachers and the aide workers that I've interviewed, some rural, some in Pietermaritzburg, I wonder if those with a disability are not getting lost with that wider definition?

M5: (Shrugging) Well, that is the fear from the disability sector. (Transcript 18)

This exchange highlights the problem for those concerned with the education of students with disabilities. Their specific needs were of limited consequence to this participant who was working entirely within the mandate of a reconceptualist approach to inclusive education, which is to identify barriers to learning. Clearly the focus on physical amenities and HIV/AIDS, while important and the most glaring of barriers to learning for many students, had sidetracked attention from another important facet: the necessity for changes of belief systems and practice if adaptations and accommodations to the curriculum were to be effected to meet the individual needs of children, including the disabled. In research such as the SIDA study, undertaken within a reconceptualist model, the specific needs of the disabled had become lost.

Indeed, the veracity of that research in its claim to be around inclusive education, can be challenged. The issues these studies focussed on were arguably critical aspects in regular education, precipitated by inadequate funding. The government had failed to provide basic amenities at schools. Similarly, there was a crucial need for education about HIV/AIDS, caused by the pandemic. This was a social issue that needed to be addressed at several levels in all schools as well as in the community. It was not, in essence, instrumental in promoting "inclusion" of any sort, which is a fundamental aim of inclusive education.

The philosophy of inclusion articulated in *White Paper 6* emanates from a developed world perspective where such conditions as those at School J, described in *A tale of two schools*, are unthinkable. It is not argued that the issues the SIDA research focussed on were not barriers to learning. Obviously they would be. But with the focus at this level, the aim of inclusive education, to promote the acceptance of marginalised groups, was compromised.

Furthermore, with the major focus on physical amenities and social programmes, schools engaged in the project were only gaining a one- or two-dimensional understanding of what inclusive education is, limited to physical access to schools and programmes to foster social competence. Indeed, there was the focus on HIV/AIDS precisely because it was becoming a factor for a majority of students. The more nuanced reality of inclusive education, with its principles of equity and the protection of minority rights, did not feature.

## **4.4 Consequences of the Conditions and Actions**

### **4.4.1 Tensions Caused by the Way OBE was Implemented**

The legacy of apartheid, causing there to be numerous under- or unqualified teachers, with consequent incompetence, was mentioned by many participants. M3 encapsulates the prevalent view:

M3: In many schools you have teachers who only have matric themselves, no degree, and no teacher education whatsoever. What can you expect them to make of highly sophisticated policy documents like those (OBE) that come spewing out of the department? (Transcript 16)

This echoes the view of Jansen (1998) who held that “the language of OBE and its associated structures are simply too complex and inaccessible for most teachers to give these policies meaning through their classroom practice” (p. 323).

Five of six participants responsible for making decisions about the placement of students in schools mentioned the drop in standards since the implementation of OBE.

### *Effects in primary schools*

A2's opinion was typical of primary school teachers' views:

A2: Another area of tremendous concern is that we, [pause] we were hoping not but the evidence really is overwhelming that the standard of education [pause] now take the basics like being able to compute with figures in maths. Doing your addition, subtraction. That's our assumption, that is sort of the basic that all children must have. Say by the time you reach grade 5 or so you can do all those things reasonably well. We are finding the standards in those areas have plummeted. I'm not just saying decreased, they have plummeted. It's since the implementation of OBE. Our mainstream teachers are simply not able to cope. (Transcript 6)

### *Effects in secondary schools*

Providing a secondary school perspective, two participants in one focus group (M2, M3) had the following interesting exchange which highlighted some of the issues, alluded to in the literature (see 2.4.4.), which they had encountered since OBE had been implemented three years previously. M2 was from a middle SES secondary school, School H, and M3 was from School C, a high SES secondary school.

M3: I think basically we've always been quite a good academic school, good academic results. We've had a 100 percent pass rate for the last however many years. But we find that now, with OBE, what we end up doing most of the time is rolling with the punches, because you never know from one minute to the next what's happening. Um, total lack of communication from the authorities, appalling levels of inefficiency, um, so it's very difficult to maintain our standards. OBE requires highly sophisticated teaching, but many teachers in our area are unsophisticated. The department constantly organises workshops for us to attend, but we never learn anything from the workshops.

M2: The variation in standards now in three years is absolutely rife. Three years ago you could more or less take a child in. Now! But, phew, God! We had a child who came from M School, Durban, came to live right next to the school so we had to take this child, who had 86, 88, 89 on all her marks, percent in grade 9. So I put her in the top class and the poor sausage got 0 for three learning areas. I then phoned her previous school and said, but these marks that you gave us, they must be incorrect? No, that's what they gave. So that's a huge problem, that's the biggest problem with OBE is the variation in standards.

M3: Absolutely horrific! We also find when the moderation groups are meant to occur all the 'good' schools arrive with their marks and the schools that should be there often aren't there. Or else they're so amazed at what the good schools have got that they're too frightened to even say anything or show their students' work. So it's a case of the rich getting richer and the

poor getting poorer all the time.

M2: It's a change of outlook from whenever, however many years, but I mean basically it's an absolute abortion! Because we haven't got the resources and we haven't got teachers who are trained. It's an abortion, an absolute abortion! The kids can't read, write, or do arithmetic anymore. Maths has taken an absolute tumble. You can do OBE. It's fine for the top class if you've got the resources, but the bottom class...

M3: You've got to have such a sophisticated teaching course and then you have such an unsophisticated teaching corps. (Transcript 16)

These participants, both from successful schools academically, had grave concerns about falling standards they perceived as being a result of OBE. Their claims are interesting and, when expanded, include the following:

- They touched on the elements necessary for successful implementation of OBE: sophisticated concepts that teachers need to be suitably upskilled to implement, and the necessity for robust evaluation processes (Capper & Jamieson, 1993). Both of these were not evident in the low SES schools with whom they were involved in the moderation process.
- M3 mentioned the sophistication necessary if the critical outcomes of OBE are to be met (Jansen, 1998), and alluded to the high number of under- or unqualified teachers who could not be expected to fulfil these prerequisites.
- These schools had been racially integrated since 1990, for 14 years, and the academic decline these participants noted had been specifically in the last three years which coincided with the implementation of OBE.
- They attributed this to the way OBE had been implemented with insufficient retraining of teachers. Supporting their view, all regular educators who took part in the current study, without exception, felt that the in-service education offered to teachers had been insufficient. Teachers from previously advantaged schools found the organisation and the content of the workshops to be a waste of time and teachers from low SES schools mentioned that they often heard about the workshop only after it was over because of their schools not having telephones and the postal service being unreliable.

It is possible, however, that these teachers from previously advantaged schools were

for the first time having contact with less advantaged schools through the moderation process required by OBE. Perhaps they had not previously been exposed to the disparity of provision within education, a legacy of apartheid, and the consequent disparity of achievement of students. Their attribution of low standards to the implementation of OBE should, therefore, be only cautiously accepted.

All teachers in the current study believed that the upskilling and preparation of teachers for the implementation of OBE had been inadequate and they believed that this was leading to a decline in standards. Primary teachers' expressions of dissatisfaction with the implementation of OBE were echoed, only more urgently, by secondary teachers. Their frustration was greater as they believed their students' final grades were being affected, and these final grades would open or close career path doors for their students.

### *Impact of changes with OBE*

The literature suggested that there had been problems with the implementation of OBE in South Africa (Brady, 1996; Jansen, 1998; Lombard & Grosser, 2004; Mkhize, 2003; Singh, Mbokodi, & Msila, 2004; Waghid, 2003). The findings of the current study indicated that, at the time of the study in KZN, there were ongoing problems with its implementation. Key aspects were:

- Inadequate in-service teacher education. This caused teachers to feel ill-equipped and reluctant to implement OBE.
- Insufficient sophistication on the part of some educators. The result of this was that there was little chance that critical outcomes would be achieved.
- Lack of useful administrative support. Documents disseminated to teachers were lengthy, wordy, and difficult for those with no teacher education to understand.
- A decline in overall academic standards. OBE without sufficient supports for it to be successfully implemented was seen to be the cause of a decline in standards.
- Lack of collaboration with parents. This caused teachers to feel isolated and as though they were unable to meet the needs and aspirations of many students.
- Teacher frustration. Contradictory directives with unsupported expectations

was causing teacher frustration and was leading to demotivation as a result.

These aspects were evident at both primary and secondary schools, and across all SES ranges. There had been no improvement in teachers' perceptions about OBE between research discussed in the background to the literature (section 2.4.4) and the time of this study.

Two threads that emerge here are

1. the political intent and its insufficiency in proving requisite knowledge, skills and resources, and
2. the preparedness of teachers to take on change. This relates to teachers' beliefs, especially a sense of ownership.

Highly efficacious teachers are likely to take on curriculum innovation (Gottfredson et al., 1995; Guskey, 1988) but it seems in the current research that participants were expressing political resistance to OBE by quietly not adopting the new practices. While teachers expressed little interest in politics, the potential power rested with teachers, for without them the political motives of government could not be put in place. Such was the power of teachers' resistance (Beeby, 1992).

This was the reality as described by teachers in regular schools at the time of the current study. It was into this climate that inclusive education policy had been introduced.

#### **4.4.2 Tensions with the Implementation of Inclusive Education**

##### ***Support for inclusive education***

The vast majority of teacher participants were against the notion of inclusion, and had varying reasons for this stance. Some teachers from both regular and special schools differentiated between students with physical and intellectual disabilities, seeing those with intellectual disability as causing the greatest challenge for teachers in the inclusive setting. They noted different challenges with inclusion of students with physical disabilities. While the majority were against inclusion, those who differentiated

between physical and intellectual disability still held this same belief for both categories, but for different reasons.

*Regular high and middle SES school teachers' views*

Teachers at regular high and middle SES schools reported that there were very few instances of disabled children being included in their schools. Several schools had only one or two students with disabilities included. In all cases such children had to fit the requirements of the school and no adaptations or accommodations were made to include them. As long as the children could cope within the parameters of the existing structures within the school they were allowed to attend. Teachers explained that they were following a government mandate to maintain high academic standards, which these schools were doing. They were accepting few disabled students as they did not consider there to be sufficient funding and support in regular education for successful inclusion of numbers of disabled students. The disabled students they did accept gained entry to the schools for a number of extraneous reasons, not because the schools were necessarily committed to inclusive education. As one school manager explained:

I do think it's a numbers thing. If we had a whole lot of them we couldn't cope. We have got one who, but he's not really a good example because he's bright academically. The only thing, his only problem is that he's missing a leg and he manages. I don't know what his first name is, [pause] and he manages to get up stairs. We haven't made any extra concessions to him at all and he copes very well. Next year we'll have our first experience of someone who is profoundly deaf and has an ear implant. [Pause]. He's going to have a personal tutor. The parents will pay for that. There's no government funding, there's nowhere that we could resource it. ... We might have thought twice about taking him, because it's a totally new experience for us. But because of this whole traditional thing, his father and his grandfather and his whatever went here. His uncle was the headmaster of the school and he's got the hugest possible family connections that one could have. (Transcript 16)

This school did not decide to accept the disabled children because of policy or because of changed belief systems, nor because of a commitment to a shared vision at the school of inclusive education. One child had been accepted at this school because no accommodations would have to be made for his disability, and the other was to be accepted only because he had family connections. Furthermore, his acceptance was contingent on his parents funding a teacher aide for him. There was no expectation on

the part of parents or teachers that supports for the children to access education should come from the school. Functioning in the medical discourse, as far as this school was concerned, it was patently obvious that the child had needs and these needs were the responsibility of the parents. This practice does not exemplify inclusive education where collaboration between the child, the parents and the teachers would identify his goals and pathways to achieve them (cf. Lipsky & Gartner, 1998; Mittler, 1995). Nor did the school identify barriers to learning and eliminate them. Other than the teachers wearing an FM transmitter, which was financed by the parents, in the model envisaged at this school, nothing would change from the school's perspective and the teacher aide, also financed by the parents, would be the accommodation to allow the child to access education in that setting.

Two secondary schools which took part in the study had, in the past, enrolled students with intellectual disabilities but whom they precluded from writing external examinations with which the students would not cope and which would detract from the schools' academic record if they were to write and to fail. In these instances, the preoccupation with excellent examination results was working counter to the philosophy and practice of inclusion similar to that described in other studies (Barton, 1997; Benjamin, 2002; Croll & Moses, 2000). While children with disabilities would be attending these regular schools, there was more a sense of them being mainstreamed as described in *White Paper 6* and discussed in the literature review (2.4.5), rather than attending within an inclusive model in which the school would identify barriers to the students' learning and would remove them.

At high SES private schools there was greater support for including students with disabilities. Two private schools that took part in the study, School K and School B, enrolled students from Grade 1 to Grade 12, and had several students with disabilities attending their schools. The principal of School K enumerated similar factors contributing to successful inclusion of disabled students as those identified by parents:

I think the size of our school first of all. It, um [pause] we are small [pause] and the ethos of the school is one where we really try to nurture the individual. And the promise we make to parents of going the extra mile. But in particular, I

think it's the quality of the staff. Not only the person who becomes the teacher's aide but, of course, the main educator in the classroom. (Transcript 21)

The elements of strong leadership, shared vision, small classes of up to 20 students, and parents wealthy enough to pay for a teacher aide, allowed for the successful inclusion of students with disabilities. A clear theme of social justice emerges where teachers and parents are able to exercise individual, collective, and proxy agency (cf. Bandura, 2001, 2002; Bandura, Barbaranelli, Caprara, & Pastorelli, 1996, 2001).

One of the schools mentioned that they had found that students with physical disabilities could be successfully included in regular classrooms throughout their schooling, but that children with intellectual disabilities found the academic rigour of high school too daunting. The school, which relied on good matriculation examination results to continue to attract students, did not make adaptations at secondary level to accommodate intellectually delayed students. These students did not stay with their age cohort, but stayed in primary school classrooms.

#### *Low SES school teachers' views*

Primary school teachers at low SES regular schools, such as School A and School J, were enthusiastic about the notion of including students with physical disabilities but, at the same time, noted matter-of-factly that students using wheelchairs would not be able to come to their schools as there were no ramps, and the classrooms were too crowded. They saw students with intellectual disabilities as posing a greater problem. They did not see themselves as having the autonomy, authority or expertise to develop different learning outcomes, perhaps life-skills, for intellectually disabled students, as the following excerpt demonstrates:

A5: Exactly, yes. And that's another big thing, their attitude and ability. I have nothing against teachers, (laughter) please. But I mean, yes, I understand from their point of view as well, they're there to teach, you know, your normal intellectual kids. Then you have someone saying I'm sending you mentally handicapped kids. I mean they already have other stresses to deal with. Also, with their experience only of the mainstream, they have no idea where to go with developing learning outcomes relevant to our children. They try to stick with the academic which is hopeless for them (disabled children). (Transcript 9)

Teachers saw themselves as having to continue with the regular curriculum and the child as failing to progress with those learning outcomes. They would have preferred to see those students replaced in special education, partly because of the child's lack of progress with academic learning outcomes, and partly because of the disruption caused to the other class members as shown in the excerpt below:

T1: I still think it's the disruptive side of the psyche of these children. You know, this little fellow, he [pause] he'll just get up and start wandering around, and pick up somebody else's crayons and stare at them, and they do what they like. I really think they need to be [pause] also in a controlled environment. But maybe learning different skills.

T2: Life skills rather than academic skills.

T1: Yes, because you know, a lot of the time is spent on learning and he just doesn't cope. His mind is, really, somewhere else.

When discussing the notion of inclusion for all students there was general scepticism about this being achievable in practice, as the following conversation shows:

T3: But a special school will be good for them. There they can help them like we can't help them.

T1: Yes, you see, there's that, but the rest of the world is saying that we must have all the children in our classes.

T4: But then the rest of the world doesn't have 60 plus children in their classes, do they? (Transcript 4)

Teachers at low SES schools, where there was inclusion by default, felt unable to meet the needs of students with intellectual disabilities. They noted as part of the problem the extreme difficulty of getting parental support or even getting parents to come to school so they could discuss the situation with them. Many of the parents were illiterate so could not read any note from the school. They did not have telephones and in some instances the schools did not either. Consequently, contacting parents became an insuperable barrier. In the teachers' view, parents were just not prepared to enter into a partnership with the school in the education of their children, nor did they want to hear that there was anything wrong with their child because they might then have to remove their child from the regular school.

Amongst teachers in regular schools there was a general feeling of relief that the 20

year plan had been implemented and that they would not be expected in the short term to include many disabled students. One teacher summed up the view of many:

T5: No. I am pleased to leave it in the too hard basket for as many years as we can. The 20 year plan sounds good to me (Transcript 4).

#### *Special school teachers' views*

Teachers who taught at a school for intellectually disabled children were unanimously and strongly opposed to the notion of their students being included in regular classrooms because of the intellectual gap that existed between them and their non-disabled peers. They did not want their children exposed to what they described as indignity.

We are talking from our children's perspective where we do not want our children exposed again to the situation where they are sitting in a grade 10 class and have to count out the counters when they are doing 3+5 sums when everybody else is doing geometry or trigonometry (T30, transcript 10).

These teachers maintained that while they were intellectually disabled, their students were emotionally sensitive. They had been placed in special education precisely because of their inability to think abstractly and they found that children were "in a way so damaged because of all the expectations that they couldn't meet that they are totally, um, crawled into their shell" (T30, transcript 10).

Consequently, they rejected the notion of inclusion for their students in regular education until there had been substantial reforms. They acknowledged inclusive education as being "on paper, a brilliant system because it incorporates all sorts of socialisation and levelling the playing field and accepting people," but felt that in reality it would not work because of the infrastructure: "I mean you have got classes with 40 to 60 kids, and how is the teacher going to cope without an assistant?" (T31, Transcript 10). While many special educators rejected inclusive education in the current situation, they would be positive about the notion of inclusion if assured their students would be provided with sufficient support in regular classrooms.

An aide worker at School F highlighted, further, the importance of expectations in the inclusive setting. She explained it as follows:

I mean, you don't want them to be cared for there. We're trying to make them independent here (at a special school). You know, you don't want someone doing things for them. You want, you want them to be given the time that they need to do it for themselves. Because they can. Given the time, they can do it. You know, I mean, it is easier for someone to help them put their socks and shoes on, but even if it takes them half an hour to do that, but then they do it. Because once they're out of school, I mean, who is going to be doing it for them? And how is a teacher who has sixty other children, teaching them factorisation or whatever, going to scaffold for this child as well as meet the needs of the others? (Transcript 9)

This excerpt raises the issue of the skills teachers require to assess learning needs, to adapt the curriculum, to make tasks challenging yet achievable, and to adapt teaching strategies to ensure that learning does take place and that intellectually disabled students are not merely cared for spectators in regular classrooms. It also highlights the necessity for adequate timing and perseverance on the part of both teacher and student.

These opinions, from teachers and aide workers affiliated to special schools, supported the view of teachers at regular schools, who cited the problem of teachers not being able to provide the time and effective teaching that intellectually disabled children would need.

### *Inclusion of students with physical disabilities*

In discussing the inclusion of students with physical disabilities in regular education, teachers at both special and regular schools focussed on two issues:

- the specialist services available at special schools and
- physical amenities

#### *Specialist services*

Teachers believed that specialist services available to students at special schools were good and would not be accessible to teachers or students if they were to be placed in regular schools. Both regular and special educators concluded that students' educational outcomes would then be compromised not improved.

Supporting this view, the teacher of a satellite unit, who was herself philosophically

very supportive of inclusive education, noted that many of the children in her class had major problems. She held that if they had the input of speech therapists, occupational therapists, or physiotherapists, her students would “have a better chance of developing their minds; where here at this school there is no such support system because the services are so stretched” (Transcript 12). Specialist services were not available to her or her students in that setting.

#### *Physical amenities*

Teachers at both regular and special schools noted that many more students with physical disabilities would be able to be included in regular classrooms if there were ramps instead of stairs and toilets with wheelchair access. Teachers at School D, a special school for physically disabled students, noted that their blind or severely visually impaired students could be included in regular classrooms if adaptive equipment were provided and support offered. Many of their students passed the matriculation examination as they were intellectually unimpaired. These teachers felt that many of their wheelchair users could be included in regular schools if the necessary amenities were provided but were more guarded about the wisdom of this in light of the excellent physiotherapy and occupational therapy their students received at their school. Without exception these teachers did not believe the same level of specialist support would be available to their students in an inclusive setting.

As noted in the background to the study, educational change of this order that is not based on collaboration and consultation with teachers is likely to fail (Darling-Hammond, 2003). Inclusive education in KZN was being implemented in a top-down model, with insufficient systems in place to ensure a shared vision and a buy-in from regular educators. Consequently, this aide worker believed it would be detrimental for her students to be placed with teachers who did not believe in inclusive education.

### **4.4.3 Tension between Government Intention and the Reality**

#### *Financial provision for families*

The current research investigated how resource issues impacted on parents of children

with disabilities. The following exchange with a parent provides information echoed by several parents:

P9: I am the mother of C9. The problem is my child can't walk. He was born like that. And they told me the problem is that I damaged him when he was born, so that he looked like a fish, but he was moving. Now, he is okay. He is lovely!! But he can't walk. And I take him to Grey's Hospital when he was four years old and they told me no, he is disabled. They told me that they are going to give me grant. For him. And I say thank you very much and I go to the social workers and they gave me the grant. After that I look for the physiotherapist and they do have, but they cost too much. We are going there. The grant helps me to go back and forth with him to the physiotherapist. Because there is nobody working at home. Not even the father. He too is unemployed. He cannot get work. And I, I go to the neighbours to do washing, gardening, everything like that to help the grant. That's my problem. The grant is too small. And my problem is money now. I want to go everywhere to try to help him.

R: And Grey's Hospital can't do anything more?

P9: Nothing. I went myself to Grey's.

R: And how often do you go to the physio?

P9: Once a week. And then it's pay the taxi, pay the physio. And two taxi to get there. One taxi to town from where I live, and then another taxi to the physio. So it is taxi fare four times to get there and home.

R: And does the grant cover that?

P9: No, I have to go out and work for extra money. I go to the neighbours and do washing, gardening, looking after the baby, anything for money.  
(Transcript 19)

This parent had only heard, through meeting parents of another disabled child, of the existence of a disability grant when her son was four. The grant was inadequate, the local school would not enrol him and she has not been informed of options such as School D which had boarding facilities but which she would not in any case be able to afford as it was not free.

The following excerpt from an interview with an aide worker at a special school highlights the widespread nature of the problem, even for parents whose children were not disabled.

The ratio of children attending school — in the mainstream — I don't think has

improved since '94. ... We suspect that the same ratio of children who weren't getting schooling has continued. There's still maybe a million children sitting at home not attending school because of financial problems. Sometimes it's just even a transport problem to get to the school and back. It's too expensive for some of them. (Transcript 6)

The intentions of the government articulated in educational policies aspiring to free grade 1 to 9 education for all and inclusive education for the disabled, as well as welfare policies, were not always readily translated into positive outcomes for families that lived in poverty. For parents with a disabled child the situation was even more difficult because of the child's additional need for assistance and therapy.

#### *Lack of cohesion across services*

Lack of cohesion of service provision across departments was a problem encountered by low SES communities, as highlighted in the following exchange between two Aide worker participants:

A2: The other big problem is there is no follow through from social services. They apply for a grant, they get a grant, and by the time they should be going to school there is no one to follow up and say, "Hey, why is your kid not at school?" The kid's just sitting and the parents very often don't know that their child has a right to a special school. A lot of them don't know the special schools exist.

A3: There's a hell of a lot of ignorance.

A2: And it's very difficult for them. We often get very cross with parents and say, "Why haven't you looked?" But when your basic need is trying to get food and water and your kid can help out at home by carrying water or whatever, you use your survival priorities.

A3: Especially for girls. (Transcript 6)

The intention of provision for children with disabilities was being hampered by the government's financial constraints and the provision of services was inadequate in the case of all participants in the current study who were in the low SES category.

#### **4.4.4 Consequence of Historical Factors and Current Actions**

The historical factors and the strategies implemented (4.2 and 4.3) were found to have

had a profound impact on the education of disabled students. From the outset, the intention in the current study was to give the participants voice and the powerful emotions experienced by the participants are acknowledged. As expected, parents, who were closest to the children, experienced more intense emotions than other groups. Even though there were three times as many teacher participants as parent participants, parent participants expressed extreme emotion nearly three times more frequently than teachers, as shown in Table 3. The consequences of the conditions and the actions on families are therefore discussed under the emotions experienced by parents.

Table 3

*Matrix Node Intersection Table Showing Emotion Intersected with Role*

Matrix Nodes	Teacher (n=35)	Parent (n=11)	Aide (n=6)	Managers (n=7)
<b>Anger</b> e.g. at low expectations, disempowerment, admin	0 (0%)*	11 (13%)	0 (0%)	0 (0%)
<b>Triumph</b> e.g at inclusion, learning to read, count	3 (9%)	4 (5%)	5 (45%)	2 (40%)
<b>Hope</b> e.g. for successful transition, independence, realistic expectations	6 (19%)	17 (20%)	0 (0%)	1 (20%)
<b>Helplessness</b> e.g. because of systemic barriers, dependence on teachers, appeal to authority	8 (25%)	46 (54%)	5 (45%)	0 (0%)
<b>Fear</b> e.g. of ostracism (discussed earlier), violence, losing control of students in classes	15 (47%)	7 (8%)	1 (10%)	2 (40%)

\* Column percentages

In the interviews, the 11 parents included emotions 85 times as compared with 35 teachers who expressed emotions 32 times. So, on average each parents' responses included statements of emotion nearly 8 times during the interview whereas each teacher expressed emotion approximately once.

The same 85 excerpts from parents depicting emotions and intersected with the SES level attributed to each parent, is shown as follows (Table 4):

Table 4

*Parents' Expressions of Emotions Intersected with their SES*

Matrix Nodes	Low SES ( <i>n</i> =5)	Middle SES ( <i>n</i> =3)	High SES ( <i>n</i> =3)
Anger	0 (0%)	8 (33%)	3 (13%)
Triumph	0 (0%)	0 (0%)	4 (17%)
Hope	2 (5%)	1 (4%)	14 (61%)
Helplessness	31 (82%)	13 (55%)	2 (9%)
Fear	5 (13%)	2 (8%)	0 (0%)

Parents of high SES expressed positive emotions more frequently than low SES parents. This is readily explained in terms of the discourse around disability that they espoused. High SES parents were leaning towards a social construct of disability, eliciting more positive emotions, while the others were more inclined to espouse a medical or moral discourse. Low SES parents had little to celebrate and little energy to feel anger about their disabled children, but expressed helplessness to a far greater extent than parents from other SES categories.

*Anger*

Essentially there were three aspects that caused this intensity of emotion and the extent to which it was expressed.

*Because of low expectations*

First, two of three high SES parents who took part in the current study, who had children with developmental delay, were angry that, at the start of some years, their children appeared to not learn anything. They viewed this as a lack of communication between the past teacher and the new one, so they felt they “had to start from scratch to get the teacher to set realistic expectations” (P2, transcript 2). In their experience, teachers often set expectations too low initially and the child did not progress. This aligns with the view of several authors who highlight the vital importance of high yet realistic expectations if students are to achieve (e.g., Booth & Ainscow, 2002; Good, 1987; Kauffman & Hallahan, 1995; Ysseldyke et al., 2004). These authors support the opinion of the parents in the current study that if there are low expectations, students

will not progress. These parents were angry that the rate of progress of their children, who were the most at risk, was jeopardised unnecessarily.

*Because parents felt disempowered by some teachers*

Second, six out of 11 parent participants raised the notion of the teacher being too powerful. It should be noted, however, that three of the 11 parents had not been able to access education at all for their children and therefore had no opinion on this matter. Essentially, therefore, six out of eight parents held this view.

It angered parents that they felt reluctant to broach a particular issue for fear of offending the teacher and in case the teacher would feel disinclined thereafter to continue to support their child. Parents who had their child in a regular school were at pains not to demand anything lest the school decide it was too difficult to continue to have that child enrolled. Booth and Ainscow (2002) note partnership between teachers and parents as one of the key indicators of successful inclusion. Where such partnership was not evidenced this often left parents feeling more than frustrated.

*Because of administrative incompetence*

Third, nine of 11 parents found the administration and organisation to be inadequate at times. For example, parents P6 and P7, who would have preferred their son to be included in a regular school, were encouraged by the special school and Psychological Services to consider the advantage of special education. The parents were pleased that their son could receive occupational therapy at the special school, which would not be available to him in a regular school. After a whole term of thinking he was receiving occupational therapy of Fridays, however, it turned out he had been going to choir practice, a voluntary activity, which took place at the same time as his scheduled occupational therapy sessions and he had not been going. This perceived incompetence angered them as the only advantage of special education, from their point of view, had been negated for three months. They perceived therapy as vital to their son's progress, as playing a role in determining his ultimate capabilities and they were angry that "sloppy organisation" (Transcript 15) had seen him denied this benefit.

Four of the rural poor parents were angry that they had had to apply for years and

years before the disability grant had been forthcoming. One of them had applied repeatedly for three years before the child came up for assessment and the grant was made available to the family.

### *Triumph and hope*

Countering the feelings of anger were feelings of triumph, expressed mainly by parents of older children, and only those of high SES. Aspects coded under the “hope” node often related to triumph, building to the next phase. Those parents who had accessed education for their children at regular schools described this as a triumph. Certainly the academic achievement of their developmentally delayed children they deemed a triumph.

### *Hope of successful transition*

C2 had the ability to type and could file documents alphabetically. His parents were adamant that he would not have learnt these skills had he been in special education and felt triumphant at his success. The hope of C2’s parents was that he would transition satisfactorily into a place of work they had found for him at the local post office placing mail in the Post Office boxes of people who preferred this to having their mail delivered to their homes.

### *Hope of independence*

Child C1 had learnt to read and was employed as a teacher aide in the Grade 1 classroom for the morning session each day. Parents eagerly celebrated such successes. Their hope for her was that she would become sufficiently independent to be able to share a house, perhaps with other people similar to her. They described other children with Down Syndrome as her cultural group and they hoped that one day she would have more to do with like people.

### *Hope that teachers will focus on social and cultural needs*

An aspiration of one parent was that teachers in regular schools would come to see that parents often valued their children’s social and cultural needs being met through inclusion and that this was more important, at times, than meeting learning needs.

Well, I just wish that, um, the teachers would realise that the inclusion programme is just that. It is not to get your child to be top of the class [pause] All [pause] you want is for your child to have an opportunity to grow in a way that he can get his full potential or she, um, you, you don't want to put them there to put them under pressure. (Transcript 1)

This mother identified one of the potential problems for teachers who were, for the first time, confronted with a child with developmental delay in their classes: that they would be seen as being unsuccessful with the child if that child did not achieve to the academic standards of the peers. P1 stressed how important, from the parents' perspective, the very inclusion of their children was. This aligns with the findings of Cole (2005) whose participants highlighted the importance parents attribute to their children consorting on a daily basis with their non-disabled peers since they will one day live as equals with them in society.

### *Helplessness and frustration*

Of the more negative emotions, coded at the helplessness node were also instances where participants experienced frustration. Middle and high SES parents typically expressed frustration, whereas low SES parents expressed helplessness. Reasons for feelings of frustration or helplessness were varied.

#### *Frustration as teacher skill is called into question*

A frustration mentioned by some parents was the dependency they felt on the specific teacher each year. P2, whose son attended a regular school, found that one year they had a teacher who did not seem able to accommodate the child's needs. She described how at primary school level, where there was just the one teacher who was the only educator in the classroom, the children were totally dependent on that person for having their educational needs met.

This view was supported by P5 who described individual teachers who did not take into account obvious needs. She wondered why her physically disabled son would be expected to do a particular hopping assessment.

Now my little six-year-old who is about to move to grade 1, he has for the last two years been to (a regular preschool) who were very hesitant to take him because they had never had a child with any physical challenges at that school,

and they found that he's integrated well. He's at all the parties, he's very popular. He's a very special child in that he doesn't sit back and say 'I can't do that'. They've just recently been having assessment of their physical abilities in which children had to hop on a left leg and hop on a right leg and with his crutches he hopped on a left leg and a right leg! But why would you? (Transcript 14)

This mother said there seemed to be no common sense used. She explained that to her mind any unqualified person would be able to see at a glance that a hopping assessment is not appropriate for her son. She described the constant underlying concern about what deductions the so-called experts were making that might lead to decisions that would not allow him to continue in regular education. She found the focus on what he cannot do, rather than on his strengths, unfair and this frustrated her as she felt powerless to interfere.

#### *Leading to helplessness*

With low SES participants the feeling of helplessness was stronger than one of frustration. The struggle for survival of these people took a lot of energy and time, and they felt less able to take control, to demand. If they were eligible for a disability grant they felt beholden and did not want to criticise or even question as they felt it would seem churlish or above their station. Consequently, they missed out on opportunities as the following exchange demonstrates:

R: And does C9 (her child) go to school?

P9: Not yet. Even though he is seven. If he could walk he would be at school this year. But the school said not this year, next year.

R: But if he could walk — another seven-year-old would be going to school would he?

P9: Yes, he can.

R: But not your son?

P9: Ja, not my son. They said he is not going to that school because he doesn't want to use that walking frame, and the callipers. They said we must look somewhere else. Sometime (maybe) next year he will go. I've got the forms here. The physiotherapist in the fifth training year said we must wait a year and see.

R: And, um, when he goes to school next year, will he go to a special school or a regular school?

P9: I think special school

R: Why? If he is clever?

P9: The physiotherapist said so. (Transcript 19)

This exchange evidenced the mother's inability to access regular education for her child. This parallels the findings of Engelbrecht et al. (2005) whose participants also found a reluctance on the part of regular educators and administrators for including disabled children. Also apparent in this exchange is the mother's complete reliance on the experts to decide what was best for her son and what should happen to him. She was not at that time able to access special education for him as she has no money and special education was not free. When the local school refused to enrol him, she did not have the efficacy to insist, nor would she like to go against the suggestion of the physiotherapist that they wait a year. The legacy of apartheid where people were not only disenfranchised but disempowered, lingered strongly here with those who lived in poverty in rural areas as they did not see change, they did not see improvement for those around them, and they did not have the skills to access the new provisions intended for them in new policy documents. Positives of democracy and rights based legislation were not yet accessible to these parents.

In the current study there was the translation of frustration to helplessness with the move down the SES scale. These are two dimensions of the same kind of experience but frustration builds either action or resentment, while helplessness prompted inaction and passivity.

#### **4.4.5 Conclusion**

The data in the current study showed that a combination of historical, resource and attitudinal conditions and inappropriate systemic strategies had led to the creation of helplessness for parents of children with disabilities especially where this was related

to low SES. Furthermore, these facets had caused resistance on the part of some teachers charged with their education and hopelessness on the part of others.

Three main themes emerge. The first relates to the notion of effective teaching to meet the needs of the disabled being about good teaching per se, not a separate pedagogy specific to the needs of disabled students. This aspect was mentioned in the background to the study by many authors (Alton-Lee, 2003; Hamill, Jantzen, & Bargerhuff, 1999; Hedeon & Ayres, 2002; Hollowood, Salisbury, Rainforth, & Palombaro, 1994; Nevin, 1998; Sebba & Ainscow, 1996; Slee, 2001; Stainback, Stainback, & Bunch, 1989; Zigmond & Baker, 1996). The view of these authors and the findings from the current study harmonise with research addressing other marginalised groups besides the disabled. An example would be the notion of teaching Māori students in New Zealand successfully in regular classrooms being simply good teaching, not necessarily different (Bishop, 2003; Bishop & Berryman, 2006; Bishop & Glynn, 1998, 1999). As with those marginalised by disability, the key is to explore how “still widely held ‘deficit’ notions of Māori students can be addressed and replaced by an alternative model that emphasises empowerment” (Bishop, 2003, p. 221). There is further alignment with his view that successful strategies, which meet the needs of marginalised groups, benefit all students.

The second theme ties in with the first, but is also important. That is, to bring about change depends on teacher expectations, and this in turn is influenced by their self-efficacy or sense of agency (Baker & Zigmond, 1995; Bennett, Deluca, & Bruns, 1997; Forlin, 2001; Guskey, 1988; Vaughn & Schumm, 1995). In parallels between marginalisation caused by disability rather than difference in culture, the findings of the current study again resonate with Bishop’s work where he, too, found the need for some shift in expectation on the part of educators (Bishop, 2003; Bishop & Berryman, 2006; Bishop & Glynn, 1998, 1999).

The third theme relates to the above, but suggests that given the first and second themes, then professional education for inclusive education can be managed within the context of general professional development for teachers once there has been some initial in-service education which addresses beliefs, assumptions, and discourse

around disability.

The findings of the current study show that there have been instances where things have worked in South Africa, where students have been included in regular classrooms. Across various settings, parents and children were satisfied with the education the child was able to access. Practical moves that might be made to start to deal with the negative aspects will be based on the good intentions of policy makers.

These elements, within these themes, form the basis of the discussion in chapter 5.

## **5.1 Introduction**

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This chapter discusses the findings and addresses the three research questions. First, participants' beliefs about disability and inclusive education are discussed. Second, participants' views about the extent to which the educational needs of children with disabilities were being met, are addressed. Third, participants' evaluation of the extent to which inclusive education, as defined in *White Paper 6*, was being achieved, is discussed. Conclusions are drawn and, finally, the study is considered in context and suggestions for further research are presented.

## **5.2 Research Question 1: Discourse around Disability and Beliefs about Inclusive Education**

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### **5.2.1 Discourse Around Disability**

Discourse embodies people's beliefs (Derrida, 1982, p. 12). It is "the forms of language used in thinking, feeling, speaking or writing which produce meanings, or constitute ways of understanding the world" (Harrison et al., 2001, p. 205) and can be a powerful determinant of what is socially acceptable, what is considered normal and viewed as correct. When applied to the concept of disability, discourse can give rise to the "immutable trace of the difference of an Other" (commentary by Trifonas in Derrida, 2002, p. 675). According to Foucault, another layer of this conception of *other* is the subject's experience of subjectivity, of "being defined as an intentional being by one's self-knowledge, by one's awareness or image of who and what one is" (Prado, 1995, p. 53). In this way, discourse can be conceptualised as "constitutive of experience rather than representational or reflective" (Willig, 1999, p. 2) determining how people view others labelled in a specific way and how those so labelled view themselves. The current study sought first of all to establish what participants' beliefs were regarding disability, and to identify what discourse they espoused.

The data illuminated that differences in beliefs about disability were strongly associated with SES but this does not imply that there may be a causal relationship. A few high and middle SES participants functioned in a social discourse around disability and many in the medical discourse. Generally it was low SES participants who functioned in the moral discourse. Their positioning was not only determined by SES, however. All espousing a moral discourse were Black, and low SES. One low SES White participant espoused a social discourse, and one high SES Black participant functioned in the medical discourse but clearly articulated the moral discourse of the majority of his low SES family members. Occupation did not seem to be a major factor and location played only a minor role in determining people's beliefs about disability.

### *Medical discourse and its impact*

Those participants who functioned in the medical discourse (Allan, 1999; Fulcher, 1989) considered the problem of disability to be sited in the child. Both teachers and parents, therefore, believed it right that parents should bear the responsibility of providing necessary supports for the children to access education at regular schools. Where parents chose special schools, they did not question that they should have to pay school fees for their child to access this type of education as education at special schools was not free.

In all instances where the child attended a regular school, the teacher aide was seen as key to the successful inclusion of these students and this was funded by the parents, who would have had to pay for the child's education had they chosen a special school. Even in the private schools and schools with excellent facilities, such as School C, there was "no government funding [*pause*] nowhere we could resource it" (Transcript 16), in order to secure a teacher aide. It would certainly have been possible for those affluent schools to provide funding for supports for the inclusion of disabled students by altering priorities. But their expressed beliefs did not encourage this to happen; nor did the discourse in society which they frequented promote a change of beliefs and, therefore, practice.

Parents' and children's response to this stance by schools can be interpreted in terms of Foucault's (1983) description of the subject and the subject's experience of subjectivity.

Parents of the disabled children had wholly bought into this “communicative framing” which provided both the disabled and the non-disabled with “a way to understand disability, and also mediates how we respond to and conceive disability” (Hedlund, 2000, p. 766). High and middle SES participants, largely functioning in the medical discourse, believed that the problem was the child’s and family’s — consequently they (rather than the state) became responsible for the provision of education for that child.

Often in the literature, a medical view of disability is contrasted with a social view. The implication is that when oppression ceases, disability dissolves into an ordinary aspect of difference (Booth & Ainscow, 1998). In the current study, participants did not reflect a social view of disability.

The view held by schools, the medical discourse, could be supported by *White Paper 6* as a coherent message was not being sent in this document. It espoused the reconceptualist model of inclusive education (Doyle, 2003) which is a product of a social construct of disability in the overarching aims. It also reflects the incrementalist model (Doyle, 2003) in the 20 year plan, generated from a medical discourse perspective. These policy writers hoped the document would be a catalyst for change in beliefs and would challenge practice thus improving learning outcomes for disabled students.

In reality, it provided the means for many people not to change at all. It allowed people to remain in the medical discourse within which special education services had been provided in the pre-democracy era (I. Du Toit, 1996; Nkomo, 1990; Wolpe et al., 1991). Furthermore, it provided justification to them for their stance: if their school was not a full-service school (Department of Education, 2001) the onus was not on them to enrol disabled students. This was clearly articulated by a regular school teacher: “No. I am pleased to leave it in the too hard basket for as many years as we can. The 20 year plan sounds good to me” (T5, Transcript 4).

The medical discourse and maintenance of the status quo was prevalent in the thinking of teachers in both regular and special schools. It was, furthermore, evident in the role of Psychological Services where, for participants in the current study, their decisions

were also premised on the medical model. Rather than providing leadership in the inclusion endeavour and seeking opportunities to promote inclusion of disabled students in regular schools, participants cited examples where Psychological Services undermined the schools' and parents' desires for students to be included by enforcing children's attendance at exclusionary special schools (4.3.2). This echoes the findings of Engelbrecht (2004) who noted that members of Psychological Services, who should be playing a leading role "in meeting learners' needs, reducing their exclusion from school curricula and communities and facilitating change in South Africa" (p. 21), frequently did not have the skill or the commitment to embrace the new vision which also did not align with their beliefs.

At the time of the current study, this would suggest that some of those working in Psychological Services in the Pietermaritzburg area held medical discourse beliefs which influenced their practice. It also follows, as noted in the literature, that deeply held beliefs sometimes need to be changed. It is necessary to develop the capacity of those within such an organisation to reveal and challenge deeply entrenched deficit views of difference which define certain types of students as lacking (cf. Ainscow, 2005). If their belief systems do not change and they do not espouse a social discourse around disability, members of this significant organisation in terms of power, may continue to work counter to the ideals of inclusive education (Fisher et al. 2003; Lamar-Dukes & Dukes, 2005), and more importantly, against the ideals of the parents who would like their children to be educated in regular schools.

### *Moral discourse*

In the present study, those participants who functioned in the moral discourse (Berg, 2003; Gill, 1999), were of low SES. Their beliefs were clearly audible in the frequently recurring theme of ostracism of the disabled by peers, teachers, and society. Participants from all groups — teachers, parents, aides, managers, and children — highlighted the prevalence of ostracism by the non-disabled functioning within this discourse, who did not see themselves as having any responsibility to include or accommodate the disabled in society or in their classrooms. These are encapsulated in the participants' voices:

#### The voice of the teacher

Because that stigmatisation is very well known. Normal people look down upon other people who have impairment. So I just don't know why they can contemplate inclusion. (Teacher at a regular school, Transcript 10)

#### The voice of the parent

You see what we are afraid of, we are afraid of the other children. They will hurt him, they will tease him all the day. He will feel ashamed. (Parent of low SES, Transcript 19)

#### The voice of the aide worker

Our experience of the mainstream schools is that it's just as intolerant as ever about children with disabilities. Many still fear the wrath of the spirits if they associate with the disabled. (Physiotherapist at a special school, Transcript 6)

#### The voice of the manager

Ja, because to me it is a bigger problem, um [pause], that all the people, let alone children, but it would be worse with children... All people with any form of impairment, any sort of physical disability are socially ostracised. There [pause] is that attitude. (Manager, Transcript 17)

#### The voice of the child

The other children, they laugh at me because I am slow. The children don't want to play with me because I can't run and do the things that they can do, and I can't talk properly. (Physically disabled child, Transcript 19)

These excerpts reveal that people functioning within the moral discourse tend to recognise predominant beliefs in schools and society, which result in exclusionary, discriminatory and debilitating practice with regards students with disabilities.

### 5.2.2 Beliefs About Inclusive Education

The overarching aim of the policy documents in South Africa centres around the philosophy of inclusion epitomised by "pursuing the holistic development of centres of learning to ensure a barrier-free physical environment and a supportive and inclusive psycho-social learning environment, developing a flexible curriculum to ensure access to all learners" (Department of Education, 2001, p. 6). It, furthermore, clarifies that inclusive education is not mainstreaming or integration, as highlighted in the literature

review (see 2.4.5). The envisioned adaptations and accommodations would not solely be effected to ensure access to the education curriculum, but also to classroom routines, as it is in these interactions that students' cultural and social needs are met.

The current study therefore investigated participants' interpretations of the concept of inclusion in education. Such an understanding is important for it positions participants' responses.

### *Key elements for disabled children to attend a regular school*

Three parents of high SES had their children with intellectual impairment attending regular schools and described them as being fully included. While the three children attended different schools, they were all three private church schools where the class size was limited to around 20 students. Two of these children had been enrolled at special preschools for children with intellectual impairment but their parents had been unhappy with the level of stimulation their children were receiving and perceived them as having greater potential than most of the other children in their cohort at the special preschool. Because they had enrolled their children in private schools from grade 1, although they were supposed to seek government approval to move their children from the special education sector to regular education, they managed to "slip through the cracks" (Transcript 3) and become enrolled on probation. The probationary follow-up never occurred and they were still in regular education eight to ten years later. Unlike the parents in the preceding section, these parents did not approach Psychological Services and their children continued to attend regular schools.

These parents noted several reasons why they considered their children to have been successfully included. The following factors were key:

#### *Teachers were provided with support*

- i. Small class sizes. Parents believed that this made the inclusion of their children manageable for the teachers, which aligns with what teachers in Smith and Smith's (2000) study noted.

- ii. The principal in each instance was pro-inclusion. Parent P2 described how, when her child was to be included at grade 5 level into a class where the teacher had never before had a disabled child in his class, the principal organised for the teacher to attend an in-service course in Gauteng which provided him with some of the understandings necessary to include the child successfully. This echoes the findings of several international studies which note the importance of leadership that values and supports the beliefs and practices of teachers (Ainscow, 2005; Ainscow et al., 2004; Fullan, 2003; Guskey, 1988; Lipsky & Gartner, 1998).
- iii. The parents were financially able. They could afford to pay for a teacher aide to assist in the classroom for as long as their children needed this. They saw the presence of the teacher aide as pivotal to the success of their children's inclusion.

#### *School ethos*

- i. Inclusion promoted. Parents felt that the ethos of the schools was such that acceptance was promoted. They maintained that the schools' Christian values made the other children more amenable to valuing disabled children. This supports the findings of research in Australia and the UK which highlight the importance of school culture in the achievement of inclusion in education (Low, 1997; Mittler, 2000).
- ii. Commitment to succeed. The schools were prepared to persevere when there were challenges, seeking solutions to problems rather than ways of avoiding them (cf. Cole, 2005). This can be referred to as collective agency. As one parent explained:

So for us we have really been at the right place at the right time, and, and it has been good. There is another little boy, C, I'm not going to say much about that, but just that [pause] the fact that, um, when K (this parent's child) was probably in about grade 6, no grade 5, okay [pause] he started at the school, and it was so interesting because K is a very placid, quiet child very, um, concentration skilled [pause] very conforming to wherever she is. That's her nature. Um... C is a very outgoing little young man, um, you know, and he's got to see how everything works and (chortle) it was just so interesting to see how the school, um, coped with the two completely different, um, characters

and, and how [pause] I think at times they sort of thought “aaaaaargh, I don’t know about this”. Yet they persevered. And I think that’s the story that could be told because you know you’re not gonna get all of them, each of them, being exactly in a little groove. They’re each different, you know, and, and just the fact that you don’t just give up... Persevere you know, because it is going to come right and, and, and to me that, that has been the most wonderful thing that I have seen come out of this — is that the school has not just given up. (Transcript 1)

### *Behaviour*

- i. Well behaved children. The disabled children were well-behaved and therefore not disruptive to the teacher or the other children in the class. As parent P2 appositely explained, “It’s one thing to have Down Syndrome, it’s another to be a social pain in the butt” (Transcript 2). This parallels the findings of Engelbrecht et al. (2000) where teachers reported that it was less stressful to include children who were well behaved.

These parents were all satisfied with the education their children received, and believed that their learning needs were being met. All three of these children were intellectually impaired and developmentally delayed. Parent P1 described how her child only started to walk at age five and then, at age 17, had just learnt to count up to a hundred. All three children learnt to read and write. Child C2 could read and write so well he was employed for part of each day in the school office to do filing and delivery of letters to the boarding establishment students. For parent P3 reading was a major goal to keep focussing on.

I want the balance. Ha, ha. What’s that though? I do want him to, um, be pushed as much as he can be. I want him to grow as much as he can. I’d like, you know, especially with reading — I want to think if he can read, it opens up such an incredible world to you [pause] um, so I would like him to learn to read as well as possible. I don’t see any ending to his learning to read. Even when he is 20 he can still be learning to read and still be improving, you know, the whole time. How one fits that into his life and what’s going to happen in the future I don’t know, but I still have visions that he will still be learning. (Transcript 3)

These parents believed that their children would not have learnt to read and write had they enrolled them at a special school where the norm may not have been to spend several hours every day engaged in reading and writing. They believed the role

modelling of the regular children was a strong motivator for their children to learn to read, write, and to persevere in the completion of educational tasks. These views align with the findings of much international research (E.T. Baker et al., 1994; Bennett et al., 1997; Hornby, 1999; Lipsky & Gartner, 1996; Vaughn & Schumm, 1995) which suggest that academic progress of intellectually disabled students is enhanced when they are included with their peers in regular classrooms.

For all the parents, having their children's learning needs met was important but the main reason they were so positive about their choice of schooling was that their children were socially well integrated. This view supports that of much international research (Alton-Lee, 2003; Andrews & Lupart, 1993; E.T Baker et al., 1994; Bennett et al., 1997; Giangreco & Cravedi-Cheng, 1998; Lipsky & Gartner, 1996) which suggests that social capital of students with disabilities is enhanced in inclusive settings. In the current study, these parents were convinced their children's social skills would not have been as advanced as they were then, had they been enrolled in special schools. The parents talked of the gaps widening between their children's and their children's peers' performance. The intellectual gap widened early and, in their experience, the social gap occurred later. One parent thought the matter through this way:

Ja, yes. In the beginning your socialisation is [pause] flawless. As, um [pause] I'll tell you. (*Thoughtfully*) Andrew [pause] left in about year 4. Year 4 maybe the intellectual gap starts to get wider. Grade 3, grade 4. One of those two years when the intellectual gap got a bit bigger, and the socialisation got a bit harder. Social. I'd say [pause] it was more the intellectual gap that was there then. The social harmony continued for a while if I remember clearly. The social one continued for a while [pause] until grade 6, 7. That's when the social gap got wider. [Pause] I think that the social gap widening is a very hard thing to deal with, but it's essential that they learn to cope. (Transcript 2)

These parents maintained their children were going to function in a world predominantly made up of non-disabled people and that they needed the skills to overcome the social gap that occurs, in their experience, at around grade 6. Having their children's cultural and social needs met was just as important to the parents as the learning needs.

Many of the elements necessary for successful inclusion, noted in the literature (e.g., Giangreco & Cravedi-Cheng, 1998; Hedeem & Ayres, 2002; Nevin, 1998; Schumm, 1999; C. A. Tomlinson, 1999), were apparent in these children's schools.

- Leadership. There was strong leadership, noted in the literature as a vital component (cf. Ainscow, 2005; Darling-Hammond, 2003; Fullan, 2003; Guskey, 1988).
- Vision. There was a shared vision between parents, principal, and teachers and which aligned with the vision of the schools such as was found to be necessary in other studies (cf. Bennett et al., 1997; Cooper et al., 1998; Guskey, 1988).
- Collaboration. There was good collaboration between parents and the school on behavioural issues and a determination to make inclusion work.

Arguably, however, despite the parents describing their children's schooling as inclusive education, what these children experienced was not true inclusion as defined by *White Paper 6*. This document rejects mainstreaming which focuses on "changes that need to take place in the learner so that they can 'fit in'" and espouses inclusion where "inclusion focuses on overcoming barriers in the system that prevent it from meeting the full range of learning needs. The focus is on the adaptation of and support systems available in the classroom" (Department of Education, 2001, p. 17). First, the children were withdrawn for part of each day and worked in a one-on-one situation with their teacher aides. Second, the classroom teachers did not take full responsibility for the learning needs of the children. In one instance this was left almost entirely to the teacher aide who was considered to be the expert. In two other instances it was the mother who decided which subjects her child would attend and for which she or he would be withdrawn. Third, while there was collaboration on solving behavioural problems, there was no evidence of collaboration between parents, teacher, aide, and child in developing an IEP, or similar, with specified aims, which would be fundamental to true inclusion.

Furthermore, parents whose children were attending regular schools were grateful for the opportunity afforded their children, and at the same time fearful of their children being excluded if there were any problems. In no way was this relationship equitable when compared with the partnership that parents of non-disabled children enjoyed with the schools.

The notion of inclusive education was relatively new in South Africa and it had not been implemented countrywide. Consequently the parents of these three children were under the impression that because their children attended regular schools, their children were experiencing true inclusion. This was illusionary rather than reality and these children were, rather, partially included.

### *Mainstreaming by default*

Teachers at two rural, low SES schools described how disabled children at their schools were included by default (Department of Education, 1995), as they would otherwise not be in education at all. The numbers of disabled students were not exceptionally high which would support the finding of the report from NCSNET and NCESS (Department of Education, 1997) that it is fallacious to assume that, in poverty-ridden areas, disabled students are being educated in regular schools. At both schools students with obvious disabilities were denied access but if the disability was not immediately apparent, the student was accepted and not later rejected once it became known that the child was disabled. Therefore, those who were included experienced milder forms of disability.

Both schools had large classes of up to 68 students, and they described having few resources and no access to specialised assistance. The basics necessary for successful inclusion, noted in the literature (e.g., Bennett et al., 1997; Cooper et al., 1998; Ferguson, 2003; Gregory, 1996; Guskey, 1988; Lipsky & Gartner, 1998; Sowell, 1989), were not evident at these schools. These teachers maintained that in their situation disabled students' social and cultural needs (cf. Giangreco & Cravedi-Cheng, 1998; Hedeem & Ayres, 2002) were met in their first years of schooling, but that teachers struggled to meet their learning needs. They also emphasised the negative impact of stigmatisation these students experienced from their peers. As these children grew older, the social

gap between them and their peers widened. They held, therefore, that these students' social and cultural needs were not met either in the longer term. This aligns with other studies (Hocutt, 1996; Nind & Wearmouth, 2005), which highlight the important role non-disabled peers play in the successful inclusion or otherwise of disabled students, which must, then, come from the leadership and the culture of the school.

Arguably the inclusion by default, too, was not true inclusion, since the collaboration with aides, specialists, teachers, parents and children was not achievable. Teacher efficacy was low as they did not feel competent to assess the learning needs of intellectually disabled students or to make adaptations to their learning outcomes, which is fundamental to successful inclusion (cf. Burnstein et al., 1999). Furthermore, these teachers reported that many more children would attend their schools if there were physical adaptations made to accommodate wheelchair users. This was corroborated by several parents of low SES who took part in the study and who had found education to be inaccessible to their children. Teachers at low SES schools thought physical adaptations to accommodate wheelchair users seemed unlikely in light of other essential resource issues, such as toilets, water, and electricity which would be addressed first. Inclusion in education in these rural areas was haphazard and seemingly not accomplished by design. These teachers were not offered any of the supports necessary to accomplish successful inclusion. Their class sizes were large; there was no additional planning time provided; and many had not been offered any professional development to equip them to cope with disabled students in regular classroom settings. The literature (2.2.4) suggests that these aspects would contribute to lack of success of the inclusive education experience.

### *Satellite class example*

At a middle SES urban primary school, School G, many teachers and the principal believed that by having a satellite unit called the *Mastery Class* where all students with learning disabilities or behavioural issues were placed, they were practising inclusion. They felt that since the children clearly had special needs, and they attended this regular school, they must therefore be experiencing inclusive education. The teacher of the mastery class believed this to be exclusionary and she noted that the students from her class were excluded and ostracised in the playground. In the afternoons during

sport, they always chose to be in whatever activity she was overseeing, because they felt safe with her. While the principal maintained the mastery class students were fully integrated into all aspects of school life and were thus included, this was not the case according to their teacher. Indeed the mastery class teacher pointed out as far as support from the principal and staff was concerned, "I get very little support. They all say 'no thanks, you are welcome to those children we don't want anything to do with them'" (Transcript 12). By definition, this model was also, therefore, not promoting inclusive education.

### 5.2.3 Summary

In summary, participants' beliefs about disability were causing them to be functioning in disparate discourses around disability. Furthermore, there was no single understanding of what constituted inclusive education. Both parent and teacher participants believed that if disabled children were attending a school which predominantly served non-disabled students, then the disabled children were experiencing inclusive education. In none of the instances was this true inclusive education as defined in *White Paper 6*. Rather, it was partial inclusion, integration, inclusion by default, or exclusion within a regular school setting. In these instances, students were expected "to 'fit into' a particular kind of system" and they could then be "integrated into the 'normal' classroom routine". In every case there was "focus on changes that need to take place in learners so that they can 'fit in'". There was no evidence, at any of the schools, of "overcoming barriers in the system that prevent it from meeting the full range of learning needs" (Department of Education, 2001, p. 17). This clear distinction made in *White Paper 6* (see 2.4.5) highlights the desire of policy writers to achieve inclusion as opposed to mainstreaming or integration. In no instances in the current study was inclusive education by this definition achieved, and no participants espoused a social discourse around disability.

### 5.3 Research Question 2: Meeting the Educational Needs of Children with Disabilities

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In some instances there was a level of satisfaction with the education experienced by some participants. Subsequent to 2000, research undertaken in South Africa within a reconceptualist model of inclusive education indicates that gains had been made to remove barriers to learning (Engelbrecht, 2004; Francis & Muthukrishna, 2004; Geldenhuys & Pieterse, 2005; Muthukrishna, 2000; Muthukrishna & Sader, 2004; Sayed & Soudien, 2005). Initiatives to educate students about HIV/AIDS had been successfully implemented. At some schools, physical amenities had improved. These initiatives addressed elements that were barriers to learning for many students, both disabled and non-disabled. The current study investigated the extent to which participants believed the educational needs of children with disabilities specifically, a minority group, were being met.

#### 5.3.1 SES the Main Determinant

##### *High and middle SES*

At the time of the study, the degree to which the participating children's needs were being met was associated in the first instance with SES. Parents of high and middle SES, in most instances, were able to access the type of education for their children that they wanted. Some parents had enrolled their children in regular schools and were able to afford the costs associated with their child being able to access education in those settings. Others chose to have their children enrolled in special schools and they were able to afford the fees of those schools which were not free at the time of the current study. All were able to afford the therapies their children needed. The education and therapy offered at special schools was excellent as evaluated by parents, teachers, and aide workers. However, education at these schools was not free and therefore inaccessible to a large percentage of the population.

### *Low SES*

In contrast, both rural and urban low SES parent participants were unable to afford special school fees; nor did they have the means or sense of agency necessary to access education for their children at regular schools; furthermore, the disability grant was insufficient for them to access necessary therapy for their children. These parents were unable to enrol their child in education and were generally despondent about their children's needs ever being met.

## **5.3.2 Preferred Type of Schooling**

### *Choices defended*

Those parents who had made a choice regarding the type of school (regular or special) their children would attend, were pleased with the way that their children were having their educational needs met. This parallels the findings from Hornby's (1999) UK study with 235 parents of disabled children, some of whom were included in regular schools and others in special schools, where both sets of parents reported equal levels of satisfaction. In that study 66% of the children attending special schools had previously been included in regular schools, and 73% of the children integrated into regular settings had previously attended special schools. The parents reported satisfaction with their current choice of placement. Similarly, in the current study, parents were eloquent in defending the choice of schooling they had made. The implication is that it is having agency and a choice that matters to parents.

### *Dissenting voices*

There were only two sets of dissenting voices in the current study, and they were parents who had not made a choice and their children were forced into a type of schooling they did not consider was meeting their children's needs. One such parent described how, despite their best endeavours, they had not managed to get their son transferred from the special school he attended to a regular school. Psychological Services, whose decision they were powerless to challenge, precluded that change and they were extremely discontented with the education their son was receiving. The second dissenting voice was that of rural poor participants who were not able to access

education of any sort for their children because they were disabled and therefore not accepted by their local schools, nor could they afford the fees of special schools.

### 5.3.3 Summary

In summary, most disabled children of high and middle SES were having their educational needs met in a manner which satisfied their parents, and which teachers thought optimal given the politico-financial circumstances, even though it was not by means of true inclusive education. Little had changed for children with disabilities from low SES families in the years since democracy. In most of these cases, enrolment at regular schools was not permitted and they could not afford education at special schools. Teachers of disabled students, included by default at regular schools, did not consider that they had the expertise, the time, or the necessary supports to include these children successfully. They, and the parents, noted the extreme ostracism these children were subjected to as they progressed through the schooling system. The outcome for these children was that their social and cultural needs were not being met in addition to their learning needs which teachers did not feel competent to meet.

## 5.4 Research Question 3: Policy Ideals of Inclusive Education as Defined in *White Paper 6* (Department of Education, 2001), in Practice

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The move towards the ideal of inclusive education in South Africa provides an interesting illustration of how reforms are effected in an education sector that reflect issues specific to its own genre as well as those that reside in the broader societal context such as that found by Mitchell (2001) was the case in New Zealand. *White Paper 6* embodies an integration of paradigm shifts which represent the outcomes of a troubled truce between emerging paradigms and their forerunners. These outcomes are in constant dispute and are therefore in a state of flux. Four resultant tensions are discussed in order to answer this research question. They are: (i) tensions at the policy to practice nexus; (ii) tensions in accepting change and methods of introducing change;

(iii) tensions caused by resources issues challenging the vision, and (iv) tensions within the elements of social change.

#### **5.4.1 Tensions at the Policy to Practice Nexus**

One of the real issues in the current research is about how policy leads practice, or not. In all countries aspiring to inclusive education, there have been tensions and the initiatives have met with variable success (E.T Baker et al., 1994; Ballard, 1999; Booth & Ainscow, 2002; Cole, 2005; Kauffman et al., 2004; Kavale & Forness, 2000; Peetsma et al., 2001; Wilson, 2000; Zigmond, 1995). What is clear is that it has been a process, not an event. In countries where inclusive education has been relatively successfully implemented it has invariably been in societies espousing a social discourse around disability and, furthermore, these countries are liberal democracies where minority rights are protected (Karvonen & Anckar, 2002).

Pre-democracy South African policy reflects that students' special educational needs were conceptualised within the medical model (cf. Allan, 1999; Clark et al., 1995; Fulcher, 1989; Mitchell, 2001; Stanovich & Jordan, 1998). *White Paper 6* represents a shift from this model where students with disabilities are segregated from their peers and excluded from regular education. Here the ideal described is inclusive education where schools provide effective education for all (e.g., Ainscow, 2005). However, even though the stated aim is to move away from the medical model, the 20 year plan outlined in *White Paper 6* still incorporates strong elements of it, notably with students still being identified as having special educational needs and being placed, depending on assessment by professionals, in resource- or full-service schools.

The current research found that there are definite tensions between those who would like to continue with the identification of students' learning difficulties and those who would embrace inclusive education. This was determined largely by which discourse around disability participants espoused and how they therefore conceptualised disability and the disabled. One of the first objectives noted in South Africa's 20 year plan towards inclusive education, for the period 2001 – 2003, was devoted to the

advocacy and information dissemination to counter discriminatory practices in society. Policy writers were aware that assumptions and beliefs of those sections in society, functioning in the moral — and to a lesser extent the medical — discourse, gave rise to exclusionary behaviours. Therefore, they made explicit their need “to convince the thousands of mothers and fathers of some 280,000 disabled children — who are younger than 18 years and are not in schools or colleges — that the place of these children is not one of isolation in dark backrooms and sheds. It is with their peers, in schools, on the playgrounds, ...” (Department of Education, 2001, p. 4).

At the time of the current study, however, in 2003, 2004 and 2005, this was one objective that participants noted had not been implemented at all in their area. There was clear evidence that other steps towards the first 2001 — 2003 objectives had been initiated. For example, some schools, which had previously been special schools, had been informed that they were to be resource schools. They had not, however, been told which schools in their vicinity were to be the full-service schools that they would be servicing. This would indicate that this facet of the 20 year plan was running behind schedule as well.

The component which participants felt was the furthest behind in all its milestones, however, was the launch of the advocacy and information programme to counter discriminatory practices in society. And this is quite probably the most important facet. In the literature, it is cogently argued that it is not possible to legislate for people’s beliefs (Barton, 1997). Furthermore, a belief system that acknowledges the rights of the disabled is a prerequisite for successfully achieving inclusion in education (cf. Ainscow, 2005; Andrews & Lupart, 1993; Ballard, 1999; Barton, 1993; Barton & Smith, 1989; Corbett, 2001; Fullan, 2003; Mittler, 2000; Sindelar, 1995; Slee, 1995, 1996; C. A. Tomlinson, 1999; Villa & Thousand, 1995). It is difficult to change societal attitudes without legislative change, however, so while legislation in itself cannot create change, it is necessary component in it. The advocacy and information programme would be the vehicle to encourage such change in beliefs. In KZN at the time of the current study, many teacher, parent, manager, aide and child participants mentioned high levels of ostracism of the disabled by those functioning in a moral discourse around

disability (Berg, 2003; Gill, 1999). This highlights the incontrovertible need for the advocacy and information programme.

In *White Paper 6*, the information and advocacy programme was bracketed with eight other facets for the period 2001 to 2003. The proposition could possibly have been that information dissemination might occur better in-process. It might have been envisaged that the advocacy and information programme would complement such endeavours as implementing “a targeted outreach programme... to mobilise disabled out-of-school children and youth” and establishing “systems and procedures for the early identification and addressing of barriers to learning in the foundation phase” (Department of Education, 2001, p. 42). The tensions caused by differing discourses around disability at the time of the current study, however, seemed to be working counter to the successful achievement of inclusive education. Policy intended to lead practice to counter deficit model thinking, but had not been successful.

#### **5.4.2 Tensions in Accepting Change and Methods of Introducing Change**

The conceptualisation of inclusive education in *White Paper 6* includes the following:

- (i) ... recognising and respecting the differences among all learners and building on the similarities; (ii) ... supporting all learners, educators and the system as a whole so that the full range of learning needs can be met; (iii) ... teaching and learning actors, with the emphasis on the development of good teaching strategies that will be of benefit to all learners; (iv) ... overcoming barriers in the system that prevent it from meeting the full range of learning needs; (v) ... focus[ing]... on the adaptation of and support systems available in the classroom. (Department of Education, 2001, p. 17)

Despite this policy document’s commitment to inclusion (see 2.4.5), teacher participants in the current study resisted the notion of inclusive education and other studies emphasise that the success of inclusive education is strongly influenced by the buy-in by the teachers who would have to implement it (Bourke et al., 2004; Cole, 2005; Darling-Hammond, 2003; Low, 1997). Teacher buy-in is more likely when there is an alignment between their beliefs and the underlying philosophy underpinning the initiative. This was lacking in KZN at the time of the current study, as discussed above

and in chapter 4 where participant M5 explained: “You will not easily overcome a prejudice he has lived with his whole life” (Transcript 17).

In addition, however, at a practical level, teachers also need to feel supported in their endeavours if they are to make the effort and to change practice. At the time of the current study, teachers in KZN had recently been involved in the roll-out of the OBE initiative. For many teacher participants this experience had been extremely unsatisfactory (see 4.3.1) and had had a detrimental impact on their willingness to embrace another initiative, that of inclusive education. There was, as it were, a sense of passive resistance and a determination that students with disabilities would better have their educational needs met in segregated settings as teachers resisted change.

#### **5.4.3 Tension Caused by Resource Issues Challenging the Vision**

The vision of inclusive education set out in *White Paper 6*, which is rights based and centred in a philosophy of social justice, is modelled on inclusive systems achieved in developed world countries (e.g., G. Bell et al., 2002; Bogotch, 2002; Rice & Ebmeier, 2002). In KZN, at the time of the current study, there were simply not the resources to provide the necessary supports to regular school teachers or to fund the physical adaptations necessary.

In the current study, the overwhelming majority of teachers in regular high SES schools were of the opinion that they provided standards of excellence for one type of student and they were not prepared to sacrifice these standards by enrolling disabled students. Despite a resonance with the philosophy underpinning inclusive education, these teachers did not believe there would be sufficient supports provided for them to meet the needs of the disabled children.

Teachers at regular low SES schools highlighted the aspects of extremely limited resources, no specialist support, and large classes as reasons for their being reluctant to embark on inclusive education.

Special educators expressed their anxiety at the likely lack of support and unchanged belief systems in regular education, which would destine inclusive education to become a “dump and hope” model (Corbett, 2001, p. 11). They did not believe that the excellent occupational therapy, physiotherapy, speech-language therapy, and the counselling from educational psychologists, provided for students enrolled in special schools at the time of the study, would be accessible to their students if they were to be included in regular schools.

Two managers, M5 and M7, highlighted the lack of human resources. M5 who played a leading role in the SIDA funded research (see 2.4.5) noted, “I think our biggest concern is sustainability, we’re full out [*pause*] and the department (provincial) at the moment doesn’t have the capacity ... there’s a lack of human capacity, there’s not enough people” (M5, transcript 18).

She was referring to the unit headed up by M7, the Chief Education Specialist in KZN, which was overseeing the implementation of the 20 year plan described in *White Paper 6*. M7 explained how, in each district, schools of excellence were being identified and intensive work was being undertaken with those schools “in the form of human resources development and building the capacity in educators through in-service training and also encouraging them to complete degrees and diplomas” (M7, transcript 22). A school of excellence was one with a strong principal and management who had complete buy-in to the notion of inclusive education and after the intensive work with the teachers at that school it would become a full-service school. The teachers’ manual, which M7 worked through with the researcher, covered the dual system history of education in South Africa, explaining separate regular and special education with its inequities, the phase in of the 20 year plan, and the need to transform the whole system to an approach based on identifying barriers to learning. M7 highlighted that, according to *White Paper 6*, between 2001 and 2003 schools being converted to full-service schools which would be supported by resource schools was supposed to have been completed. In 2004, she was clear that this phase was behind schedule because, supporting the view of M5, of lack of human resources to identify the schools of excellence which would become the full-service schools and to undertake the necessary

upskilling of teachers in those schools. She noted that this phase of the 20 year plan, in 2004, was only in its initial stages.

Participants were clear, however, that this lack of resources was not a function of government losing the vision of achieving inclusion in education; it was rather a consequence of other equally important aspects such as free general education for all eating away at limited resources, and the economic strain caused by the HIV/AIDS pandemic.

#### **5.4.4 Tensions within the Elements of Social Change**

With the advent of democracy in South Africa, commitment to individual and community rights was enshrined in the constitution and institutionalised in policy documents. *White Paper 6* epitomises this. In South Africa the objectives have only partly been achieved and it is interesting to consider why, in light of social change.

Many of the findings in the current study have been presented under high, middle, or low SES perceptions. In the South African context it is interesting to consider how this hierarchy of SES maps onto races, as it highlights the legacy of apartheid. In the current study, all high SES participants were White, and all low SES participants were Black, excepting one. Additionally, all high SES schools had previously been advantaged schools under apartheid, serving Whites. While these schools had been racially integrated since 1990, at the time of the current study the student population was still predominantly White. All middle SES schools had previously been Whites only schools, but with integration since 1990 had races distributed as found in KZN. All low SES schools had been Blacks only schools under apartheid and they were still exclusively serving Black students. Disparity between rich and poor was still to a great extent delineated along racial lines. In 2006, while 65% of Whites older than 20, and 40% of Indians had matriculation or higher qualification, among Blacks this figure was only 14% and among the Coloured population it was 17% (South Africa Info, 2006). The legacy of apartheid continued to fulminate, and was slow to be eradicated or to have its effects ameliorated.

The disability movement internationally has seen changes effected over time (see 2.2.2, 2.2.3 and 2.2.4). With the inequities of apartheid, the social environment in South Africa was such that the strength of the disability movement was not as robust as in other countries which were not engaged in a struggle for democracy per se, although it fits philosophically with a shift to democracy. The majority of disabled lived in low SES rural areas (Charema, 2005) and there was lack of collective agency on the part of the disabled as they struggled for survival (see 4.2). The lowly status of the disabled, particularly in rural areas, reinforced the status quo and their efficacy was undermined by beliefs of the non-disabled. Consequently they were less agentic to effect change than is the case in developed world countries.

The two extremes depicted in the *Tale of two schools* were indeed real extremes. Society in KZN was more complicated than that, however. The findings, discussed in chapter 4, highlighted the complex and nuanced nature of society in KZN at the time of the current study (see 4.2). Under apartheid, people were rich or poor and they were racially coded. At the time of the current study, a decade after democracy, they were no longer so coded and the rigidly separatist policies of apartheid had been dismantled. Nevertheless, while there was great joy at the achievement of democracy at one level (cf. 2.3.6), a liberal democracy also requires the introduction of liberal individual rights (Karvonen & Anckar, 2002). Achievement of this deeper level of democracy had been retarded by people's beliefs, and had affected the ability of the disability movement to achieve inclusion in society and also inclusive education to the same extent as developed world countries.

#### **5.4.5 Summary**

In summary, many sectors of society were not espousing a discourse around disability that would enhance the likely success of inclusive education. There were high levels of discrimination against, and ostracism of, the disabled. Teachers at regular schools were by and large not supportive of the move towards inclusive education. They were unprepared to enrol students with disabilities because they did not believe they would

be provided with sufficient support to meet the needs of these students in regular classrooms. Special educators were equally reluctant to embrace inclusive education at the time of the current study because they feared for their students' wellbeing in regular settings and did not believe they would receive the support and quality of education they were currently receiving in their separate settings. Resourcing of supports and in-service education to empower teachers was inadequate. Consequently, at the time of the current study, the milestones stipulated in *White Paper 6* were not being met on time, and there was limited inclusive education in practice.

## **5.5 Conclusion**

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### **5.5.1 Politics of Disability – The Catalyst for Change**

The progress towards inclusive education has been different in each country where it has been increasingly implemented. Even within different areas within one country or within different schools within one area, the move to inclusive education has been idiosyncratic. Indeed, Clough and Corbett (2000) demonstrate that each person seems to take a different route to inclusive education as they are influenced by theory, the disabled themselves, and as their beliefs change.

In chapter 2, key elements necessary for inclusive education to succeed (2.2.4), the evaluation of the success of inclusive education (2.2.5) and some of the challenges that have been encountered internationally (2.2.6) were distilled and described from international accounts. It is valuable, now, building on the answers to the research questions, to chart the struggle of the disability movement for change in the USA and the UK, which has led to relatively successful inclusive education for students with disabilities, and then to compare and contrast these with the situation in South Africa. This shows the similarity in the two developed world countries in their achievement of inclusive education and it provides some answers as to why the implementation of inclusive education is not as advanced in South Africa. These two countries are selected for the following reasons:

Racial aspects: In the USA, especially in the Southern States, there is a similarity between the struggle for equity and against racial discrimination experienced there and that encountered in South Africa in the years prior to democracy. While not as acute in the UK, cultural diversity has caused tensions and confused the issues around race versus disability.

Disparity between rich and poor: South Africa more nearly resembles the disparity in the USA between rich and poor than would be the case in some countries which have greater social security, such as France, and which more nearly resemble South Africa by population total. In the UK the issue of historically determined social class, more than race, has contributed most to disparity as it impacts on social change.

### **5.5.2 Inclusion in the United States of America**

Politicians and policy makers in the USA recognise that disability is a human rights issue as important as sexism, racism, and other forms of social exclusion and consequently anti-discrimination laws have been promulgated (Stone, 1999). The shift in discourse from the medical model to a social construct of disability, which has precipitated the law changes, has largely been due to disabled people politicising disability (Campbell & Oliver, 1996). This links back to the earlier point of laws and attitudes, and how these intertwine.

At a macro-level, while democracy suggests that power is exercised by all the people, in reality there is a system of representative democracy whereby elected leaders make decisions for which they are accountable to the people. In the USA, as in most developed world countries, politics is inextricably linked to the free market principle of capitalism. Therefore, there are inequalities with the rich having more political influence, opportunities, and choices than the poor. "Poverty is disproportionately high among the disabled population in both the minority world of the West and the majority world of the rest" (LaPlant et al., 1997 cited in Barnes & Mercer, 2001, p. 12) as disability impacts on ability to make choices and access opportunities.

Since political parties generally claim to represent the interests of the whole of society, rather than one minority group such as the disabled, political parties are unlikely to use disability issues as the central platform to win elections. Furthermore, they are seldom concerned with disability issues as predominant policy issues. The disability sector, therefore, has to rely on activism and single-issue pressure group lobbying and campaigns to exert political pressure. The economic and political changes in the USA in the 1960s propelled by mass political action used by Black civil rights activists and the women's movement provided the impetus for the emergent American disability rights movement to lobby for change on their behalf. In the 1970s "grassroots groups and organisations" such as the "Disabled in Action" whose numbers were augmented by disabled Vietnam war veterans, became increasingly prominent "with demonstrations, sit-ins and other protests" (Barnes & Mercer, 2001, p. 14). Quite possibly acceptance of disability might have been enhanced by the inclusion of war veterans, since their disabilities were attributable to the good of the country. These activities elicited changes in legislation with disability related clauses being inserted. For the first time, in 1973, discrimination against the disabled in federally funded programmes was prohibited.

In 1974, the American Coalition of Citizens with Disabilities (ACCD) was formed which played a pivotal role in unifying 60 local and national affiliated organisations. The voice of the disabled was becoming more united and cohesive and, therefore, amplified. In the 1980s many disabled individuals sought redress against discrimination through the American judicial system. The media attention to these cases "raised the profile of the disability rights campaign" (Barnes & Mercer, 2001, p. 15). The heightened pressure on politicians culminated in the 1990 Americans with Disabilities Act (ADA) which remains the most extensive and far-reaching anti-discriminatory law anywhere in the world (Charlton, 1998). The central aim of the ADA was "the integration of disabled Americans into the mainstream. The ADA outlawed discrimination on the grounds of 'disability' in employment, environmental access, transportation, state and local government and telecommunications systems" (Barnes & Mercer, 2001, p. 15).

In the education arena, the 1975 the Education for All Handicapped Children Act was a federally based civil rights law which states that children with disabilities are legally entitled to free, appropriate, public education that meets their education and related services needs in the least restrictive environment. Despite the suggestion in IDEA that the least restrictive environment might be a regular classroom, 1976 legislation promoted the implementation of segregated special education (National Association of State Boards of Education, 1992), reflecting the prominence of the medical discourse around disability at that time. The education offered to disabled students differed from that experienced by their peers in terms of curriculum content, placement, and instructional strategies. Longitudinal studies showed that students in these segregated settings were performing poorly (Fisher, Roach, & Frey, 2002) and by the mid-1980s many organisations began to lobby for students with disabilities to be included in regular classrooms.

The Individuals with Disabilities Education Act (IDEA) has been revised several times as the disability movement gained a higher profile. A significant amendment in 1997 “mandates that all children with disabilities be educated in the class and school building they would normally attend if not disabled, except where the child’s needs dictate otherwise” (Pivac, McComas, & LaFlamme, 2002, p. 98). The premise here is clearly that the most effective instruction for children with disabilities is provided “when it is grounded in general education curriculum and delivered, to the maximum extent possible, in the general education classroom” (Fisher et al., 2002, p. 65).

Evaluation and critique of inclusive education in the USA shows that it has met with variable success (Skrtic, 1991; Stainback & Stainback, 1996; Villa & Thousand, 1995; Zigmond, 1995), but the general shift to more inclusive attitudes and practices is clearly evident in both legislation and in practice. Halfway through the first decade of the new century, research in the USA is starting to focus on which innovations of inclusive education have been sustained over time in schools, and which factors influence their sustainability (Sindelar, Shearer, Yendol-Hoppey, & Liebert, 2006). In the USA, there is the clear expectation that children with disabilities will be able to have their educational needs met in regular classrooms and families have recourse to law should they be denied. This highlights that the implementation of inclusive education is a

process that evolves and changes over time and raises the question of whether a 20 year time span for South Africa is reasonable.

### **5.5.3 Inclusion in the United Kingdom**

In the UK, the disability movement followed similar trends to the USA, but with slightly less success. “There is now almost routine consideration of class, ethnicity, gender and sexuality in relation to citizenship. Disability and the position of disabled people as ‘citizens’ has not, however, received as much attention” (Beckett, 2005, p. 405). Partly, this has been caused by two elements not always singing in concert: organisations run by non-disabled people *for* disabled people, and the more recent definition of the UK disability movement which is constituted by organisations *of* disabled people, such as the British Council of Disabled People (Oliver, 1997).

Up until the 1970s, as in the USA, the medical model prevailed in the UK. Then, the shift to a social model of disability is reflected in the work of the disability movement which defined disability as “the disadvantage or restriction of activity caused by a contemporary social organisation which takes no or little account of people who have physical impairments and thus excludes them from the mainstream of social activities” (Union of the Physically Impaired Against Segregation (UPIAS), 1976, pp. 3-4). The social model continued to evolve as the disabled sought emancipation. Links have been made in the UK between the oppression of the disabled and other forms of oppression such as sexual identity (Appleby, 1994) and racism (Borthwick, 1996). With the turn of the century, and in the changing political climate, disabled people in the UK “are increasingly making connections with non-disabled people as precursor to influencing organisational changes to policy and practice” (Tregaskis, 2002, p. 467).

Clough and Corbett (2000), in tracing the journey towards inclusive education in the UK, highlight several key perspectives in theories of inclusive education that have played a role in this journey. They point out that it is not a neat linear progression, and that the psycho-medical model, prevalent in the 1950s, has some influence still today. “It is a truism that ‘special’ education owes its origins ... to the development of a

*pathology of difference*, first through medical, then, later, through psychological enquiry” (p. 11 italics in original). Special schools with separate education systems were deemed the best way of catering for students with disabilities.

During the 1960s and 70s there was a sociological response to the medical model’s premise that the problem within the child needed to be remediated. Appearing shortly after the UPIAS declaration, the Warnock report repudiated the practice of identifying children by means of their disability. Rather, children’s special educational needs should be identified and provision made to meet them (Department of Education and Science, 1978). This was the start of the move away from separatist provision for disabled students.

With the increasing consolidation of the social model of disability, critics of separatist education challenged “the previously taken-for-granted assumption that special schools existed benignly, genuine in their concern to serve the interests of children with marked learning difficulties” (Clough & Corbett, 2000, p. 16). They saw special education as providing a means for medical and psychological professionals to promote their perspectives and profile in special education. Furthermore, special education was seen as providing the means for regular educators to be relieved of the responsibility of teaching children with special needs (S. Tomlinson, 1982). These sociological perspectives challenged the prevalent psychological approaches.

“Many of Warnock’s recommendations became law in the UK through the enactment of the Education Act 1981” (Clough & Corbett, 2000, p. 4) and the responsibility was placed on teachers to develop IEPs. With this development, the focus was on curriculum and adaptations and accommodations that could be made to meet the educational needs of all children, including the disabled. Clough and Corbett (2000), note this as another key element in their theories of inclusive education. In the current study, this aspect was not considered a theory as such, rather as the translation of theory into practice. What is valuable in their analysis is the following:

It is arguably the curriculum which always stood — secure as the Berlin Wall — between mainstream and segregated special provision; it was the possibility of mediating that curriculum, and the means of its delivery, which enabled

‘integrative’ education; and it is still the curriculum on which the success of any truly inclusive initiative rests. (Clough & Corbett, 2000, p. 21)

Evaluation and critique of inclusive education in the UK shows that, as in the USA, it has met with variable success (Ainscow, 2005; Allan, 2003; Mittler, 2000). There have been significant successes as well as challenges that persist (see 2.2.6). Where the UK is arguably in advance of the USA is with the Index for Inclusion which provides schools with a means to regularly evaluate the effectiveness of initiatives they have implemented and which may need to evolve.

The progression of influence of the disability movements in the USA and the UK provide an overview of the shift in paradigm from exclusion of the disabled in society and in education to greater inclusion. This shift is a process and not an event as explained by Booth and Ainscow (1998): “In our definition of inclusion, an inclusive school is an ideal never fully attained and inclusion is about changing processes, enhancing participation, and reducing exclusionary pressures” (pp. 97-98). The progression in these two developed world countries has not been identical, but there are similarities. The comparison with South Africa, as a developing world country, follows.

#### **5.5.4 Inclusion in South Africa Compared with the USA and the UK**

In comparing and contrasting the route to inclusive education in South Africa with those in the UK and the US, the main differences are seen to be bound up in the struggle for democracy in South Africa and the subjugation of the majority of the population under apartheid. Many contrasts occur as a consequence of South Africa being a developing world country, whereas the UK and USA form part of the developed world.

During apartheid, when discrimination was evident in almost all facets of life, discrimination against the disabled was no surprise. Seen within a medical discourse, educational provision for some disabled students took place in segregated schools (see 2.4.3) but there was little provision for Blacks. Charity organisations, run mostly by

non-disabled people, played a vital role in raising funds and providing assistance to disabled people who lived with a particular disability.

In the USA and the UK, the 1970s saw the evolving of a social construct of disability and with it a rich expansion in curriculum in the mainstream of education, readying teachers philosophically and practically to meet the needs of diverse students in their classes. In South Africa, theory around disability remained static, frozen in the medical model, and social struggle against oppression was almost exclusively centred around democracy. In the UK and the USA, activist groups played a key role in changing legislation to the benefit of the disabled. In the 1970s the apartheid regime was at its most vicious and repressive, however, determined to rule by force (see 2.3.2) and activist groups could not easily exist under apartheid. After the release of Mandela in 1990 there was racial integration in regular schools, but segregation of students with disabilities persisted.

With the advent of democracy in 1994, there was the need for social and educational policy to swiftly redress the inequities of apartheid. In the UK and USA there had been parallel changes over a period of some 20 years to a social construct of disability and the gradual changes to curriculum and educational policy including provision for the disabled. In South Africa this happened almost overnight. The dismantling of apartheid seemed to consume the energies of change. Perhaps to go beyond that, to conceive of disability within a social construct, was too overwhelming.

Special education policy was based on consultative documents (Department of Education, 1995, 1997, 1998, 1999, 2000, 2001) and, through collaboration, there was agreement on aspiring to a system where stigmatisation and separation will cease to exist and every student's rights to human dignity, to education, and to equality will be realised. The establishment of the National Commission on Special Needs in Education and Training (NCSNET) and the National Committee on Education Support Services (NCESS) (Department of Education, 1997) provided collaboration with disability groups that the international and South African disability movements desired. At a macro-level, this consultation with the disabled in the development of legislation made

South Africa, at the turn of the century, one of “two countries where disabled people are participating with the greatest equality” (Hurst, 2000, p. 1086).

From the mid-1990s, there has been more cohesion internationally from disabled movements. Leaders of international disability organisations today, many of whom were born in poverty and illiteracy, are from the developing world and their call is for an understanding that “environmental impacts are the key to understanding the nature of disability/disablement and how solutions must come through social change” (Hurst, 2000, p. 1086). These leaders, together with the South African disability movement, influenced the content and intent of legislation on inclusive education in South Africa.

The ideals articulated in *White Paper 6*, therefore, focus on barriers to learning. Viewed from a perspective that achieving inclusion is a process and not an event, a strength of *White Paper 6* is that there is legislation in place for inclusive education and it remains an ideal to be worked towards. In a sense, the dismantling of apartheid could be conceived as more of an event than a process. In this latter sense, achieving inclusion was perhaps not necessitated by an event per se, at least not with the same veracity of the overthrow of government to bring about change. In the case of inclusion, the goals are an ideal, and therefore relate more to the evolution of beliefs and shared beliefs than to a significant event as a marker in time.

In translating *White Paper 6* into practice, social distortions which were the legacy of apartheid caused the priority to be removal of barriers to learning for a majority of students. At the time of the current study, inclusive education from that perspective was being implemented where possible and measures introduced under this initiative, such as improved toilet facilities, the provision of electricity, and HIV/AIDS awareness initiatives, had a good prognosis for success.

The needs of the disabled specifically, within the barriers to learning approach to inclusive education, were the focus of the current study, however. Three plausible reasons why the ANC altered course from a reconceptualist quest for an inclusive education and training system, and included interim steps epitomising an

incrementalist approach for one particular group, the disabled, emanate from the preceding discussion.

### *Teacher efficacy*

The tenets underpinning OBE and the skills needed to implement OBE successfully were seen by some policy writers as a good foundation and the first step towards inclusive education. The disenchantment of many teachers with OBE and its implementation, however, had impacted negatively on teacher morale and efficacy. Since the implementation of OBE had been more time-consuming and problematic than originally anticipated, human and physical resources were having to be reallocated to this area, to afford that initiative greater opportunity for success. If this initiative was not substantially reinforced, it would be unlikely to succeed. The essential aspect of teacher buy-in was lacking.

Overlaying and underpinning all practice were people's beliefs about disability and the disabled. In the current study no regular or special educators, while many were philosophically supportive of inclusive education, were in support of the immediate implementation of full inclusive education.

In the introduction to *White Paper 6* the then Minister of Education states:

I am also deeply aware of the anxieties that many educators, lecturers, parents and learners hold about our inclusion proposals for learners with special education needs. They fear the many challenges that may come with inclusion – of teaching, communication, costs, stereotyping and the safety of learners – that can be righted only by further professional and physical resources development, information dissemination and advocacy. (Department of Education, 2001, p. 3)

This indicates that during the consultation phase in the lead-up to *White Paper 6*, government had heard quite clearly the united voice from special and regular educators that this was not the time to implement full inclusive education for disabled students as few educators saw a way for it to be successfully accomplished.

### *Child and parent efficacy*

Furthermore, the legacy of apartheid was still evident with low SES participants having little efficacy to strive for change. They had been disempowered under the apartheid system and their sense of helplessness in their struggle for survival did not seem to have been alleviated. Exclusionary attitudes in society persisted since many people, especially in rural areas, were functioning within a moral discourse. The reality of ostracism of the disabled was a powerful theme that emerged from the data in the current study. The government paid heed to cautionary comments from educators and parents that exclusion in society as a whole should be addressed before fully inclusive education was contemplated. The advocacy and information programme outlined in *White Paper 6* aimed to address this.

Frequently, schools have been seen as being the hands of politicians for social engineering. It is sometimes thought that to bring about social change it is necessary to bring the change into education first, and then society will change. The overarching goals in a reconceptualist model of inclusive education in *White Paper 6* reflect this view. However, the feedback from the consultation process had been so forceful that the interim steps of the 20 year plan were included and the information and advocacy programme was placed prominently in the first three-year phase.

### *Resources*

In addition, when the ANC took over in 1994, with the advent of democracy, they inherited a country that was not as affluent as they had expected (see 2.3.6). Also, it had not been possible to predict the escalating impact of HIV/AIDS and its crippling drain on resources. The new government was forced to adapt policy and to prioritise, with the consequential effect that free grade 1 to 9 schooling and the need to improve facilities at previously disadvantaged schools took priority over funding inclusive education initiatives.

This current study considered the needs of the disabled as a distinct group within the wide definition described in *White Paper 6* which includes “age, gender, ethnicity, language, class, disability, HIV or other infectious diseases” (Department of Education, 2001, p. 6) and which focussed on barriers to learning. Disabled students were

arguably becoming lost in the wide definition of need articulated in *White Paper 6* because inclusive initiatives were addressing barriers to learning for a majority of students while the disabled, as a minority group, were not being targeted.

The funding for education in KZN at the time of the current study had not been sufficiently disaggregated to promote the achievement of the steps in the 20 year plan within its given timeline. If funding were specifically allocated to ensure that the needs of the disabled were being met in the interim steps of the 20 year plan, then there would be a better chance of the milestones regarding full-service and resource schools being achieved. There would be greater likelihood that the educational needs of students with disabilities would be better met. On the one hand it can be argued that this supports the principle of equity, as contrasted with equality, and what is sometimes referred to as positive discrimination, which aims to redress inequities. On the other hand, it could be considered tantamount to reverting to a separate system for disabled students. To have funds specifically targeted to students with disabilities would run counter to the strongly argued viewpoint by many authors who support a reconceptualist model of inclusive education (Ainscow, 2005; Booth & Ainscow, 2002, 1998; Griffiths, 1998; Kenworthy & Whittaker, 2000; Lipsky & Gartner, 1996; Low, 1997; Mittler, 2000; Sindelar, 1995; Slee, 1996, 2000). These authors hold that disability is not the only aspect of difference subject to exclusionary pressures, since differences of gender, race, sexuality, attainment, class and wealth are used to negatively discriminate against less favoured groups. Hence, they hold, the issue of disability cannot have favoured status in considerations of inclusion and exclusion. By stipulating provision for those with disability, they argue, there is categorising which immediately brings about *us* and *them* power relations, and all the negatives associated with special education as a separate entity. The counter argument to this is that it becomes difficult to evaluate if inclusion is working for the disabled without identifying the needs of learners and categorising their needs, not them as individuals.

At the time of the current study, the Government desired to achieve inclusive education in a reconceptualist model, based on the principles of “human rights and social justice for all learners; participation and social integration; equal access to a single inclusive education system...” (Department of Education, 2001, p. 5). It seemed,

therefore, unlikely that funding would be targeted for one specific minority group unless it could be seen as transitional positive discrimination to rectify the imbalance.

### **5.5.5 Practical Implications**

Given these related findings, there are practical implications as follows:

#### ***Fiscal implications***

Fiscal demands forced a change of priorities for the government. For example, there was the gradual rather than immediate implementation of free grade 1 to 9 education for all when they came to power, this despite their commitment to the Declaration of Human Rights which states in article 26 that elementary education shall be free (Universal Declaration of Human Rights, 1948).

At the time of the current study, there was still a great deal of work that needed to be done if rural schools, such as School J, were to be improved so that their physical amenities and standards more nearly resembled those of wealthy urban schools. This, therefore, was the fiscal priority for the Government. “Since 1994, education policy documents that emerged entrenched the principles enshrined in the Constitution: education as a basic human right, quality education for all, equity and redress, the right of choice, curriculum entitlement, rights of parents” (Muthukrishna & Schoeman, 2000, p. 318). This priority meant that the amount of funding that could be allocated to the implementation of *White Paper 6* was limited. Furthermore education funding was disseminated to the nine provinces together with funding for all services (for example, health, education, welfare), and so the provinces decided on priorities within their particular context.

#### ***Physical adaptations and supports unachievable***

Addressing these issues meant that expensive adaptations to the environment to allow physically disabled children access to education in regular schools had not been implemented at the time of the current study. Participants in the current study lamented that the envisaged reduction of class size and the upskilling of the teaching corps had not been able to be accomplished.

### *Milestones not reached*

At the time of the current study, the milestones for the interim steps of the 20 year plan for the period 2001-2003 (Department of Education, 2001) were not being met at several levels:

- strengthening of the special schools had not occurred in 2004, but by July 2005 additional specialist staff had begun to be appointed to some of the special schools in the current study.
- a special school in the current study which had been informed it was to be a resource school had not been informed which schools in their area were to be the full-service schools.
- this resource school had not yet been included in the district support team, or informed who constituted this team, and
- advocacy and information programmes had not been instituted that any participants were aware of.

Between June and October 2005 several further documents were published which would begin to address many of these issues. They included the implementation of the district based support teams (Department of Education, 2005a); the practicalities of the establishment of full-service schools (Department of Education, 2005b); the adaptation of curriculum to meet the needs of diverse learners (Department of Education, 2005d); a clear management plan for the first phase of implementing inclusive education (Department of Education, 2005e), the practicalities of transforming special schools to resource schools (Department of Education, 2005c); and guidelines for teachers at both regular and special schools for inclusive learning programmes (Department of Education, 2005f). Further research would be necessary to establish the usefulness of these documents in assisting schools to effect the necessary changes. As happened in the USA and the UK, change is occurring gradually.

### *Outcome for disabled jeopardised*

In South Africa, where resources were under pressure at the time of the current study, the implementation of inclusive education was not improving educational outcomes for disabled students. Evidence of this was the inability of the system to meet the milestones of the 20 year plan in practice. Most other research subsequent to 2000 in

South Africa had taken place within the broad definition of need with no particular group being singled out; therefore the focus had been on barriers to learning. Those studies showed that funding allocated for the implementation of *White Paper 6* had been utilised for initiatives that would benefit the greatest number of students. AIDS awareness programmes had been instituted, basic toilet facilities were being built at many schools, and electricity was being introduced, which would mean computers would become accessible to students. These were important measures for a large number of students. The allocation of resources to such initiatives clearly fell within the mandate of the wide definition of need defined in *White Paper 6* as these were clearly barriers to learning. A great number of students, including some of those with disabilities, would find barriers to their learning had been removed with these advances. The allocation of funding that would specifically make education more accessible to students with disabilities was not evident, however.

#### ***Diverse requirements problematic***

Writing policy that would bring into being effective practice for students from such a wide, diverse, often contrasting nation, encapsulated to a degree in *A tale of two schools*, was problematic indeed. The needs of both the wealthy and the poor, of both urban and rural sectors had to be addressed. The government did not want inclusive education to be implemented in such a way that it was likely to fail as was frequently the case in developing countries (Charema, 2005; India, 2000). Trying to move purposefully towards inclusive education while at the same time realistically recognising that “believing in and supporting a policy of inclusive education are not enough to ensure such a system will work” (Department of Education, 2001, p. 16), led to the development of the 20 year plan, but with all needs being interpreted in terms of “barriers to learning and development” (Department of Education, 2001, p. 12).

Underlying all policy changes was an absolute commitment to retaining academic standards in schools that currently produced excellent examination results and not to sacrifice standards. *White Paper 6* enumerates the initiatives already instituted to accomplish this: “... the COLTS programme previously, and now the Tirisano programme, the District Development Programme, Curriculum 2005, the Language in Education Policy, Systemic Evaluation (of the attainment of Grade 3 learners),... the

joint programmes with the Business Trust on school efficiency and quality improvement” (Department of Education, 2001, p. 25).

In the government’s view, disparity of provision between poor rural and wealthy urban schools needed to be addressed as the main priority. Two programmes to progress this ideal have been

- The fee-free schools programme whereby institutions receive sufficient funding from the state and do not need to charge school fees. These schools have been identified subsequent to the completion of this current study, and will make up 40% of schools by 2007 (South Africa Info, 2006).
- The National Schools Nutrition Programme which provides food for students each day in eight urban and 13 rural areas where poverty is most prevalent. The Minister of Education articulated the aim which is to ensure the scheme reaches five million children in 15000 schools in rural and farm communities and in informal settlements (Pandor, 2004).

Such programmes have impacted on the amount of resourcing that could be allocated to the implementation of *White Paper 6*. Given the politico-financial constraints at the time when the document was written, policy writers considered the interim steps in *White Paper 6*, for meeting the needs of the disabled, as the only practical stop-gap.

### **5.5.6 Theoretical implications**

There are several theoretical implications.

#### ***Teacher buy-in pivotal to successful inclusive education***

Various theories concerning change, such as that leading to successful inclusive education, highlight the importance of teacher buy-in (Datnow et al., 2002; Winter & McEachern, 2001). There needs to be whole school commitment to reform (Cooper et al., 1998; Nind & Wearmouth, 2005) so that teachers feel consulted, are inspired by working in a collaborative environment and, most importantly, so that they feel supported emotionally and with resourcing in this new endeavour (Forlin, 2004).

Likewise, theoretical discussions about countries where inclusive education has been relatively successfully implemented, highlight the importance of staff development (Bourke et al., 2004; Fullan, 1991, 2003). Failing this, teachers lack confidence and efficacy (Baker & Zigmond, 1995; Barton & Smith, 1989; Ferguson, 2003; Robertson, 1999; Vaughn & Schumm, 1995). Consistent with self-efficacy theory (Bandura, 2001, 2002; Bandura, Barbaranelli, Caprara, & Pastorelli, 1996), such teachers do not believe they can meet the learning needs of the disabled students in addition to those of the non-disabled peers in their classes (Forlin, 2001).

In the current study, the development of full-service schools in KZN was in its initial stages. The in-service teacher education at those schools had a strong emphasis on historical inequities which was used as justification for promoting inclusive education as the ideal in the New South Africa. The next phase of teacher education focussed on the philosophy of inclusive education leading to the conceptualisation of barriers to learning. The third phase was intended to build capacity in educators who were provided with practical supports and teaching aids such as HIV/AIDS awareness programmes and workshops on group-work which was seen as linking to the needs of OBE as well. In-service education on meeting the needs of disabled students was not a specific part of the programme. They were included merely as a group who would experience barriers to learning as would children who lived in poverty or were subject to abuse.

It seems that the specific skills needed for teachers to successfully include disabled students, such as the analysis of individual learning needs (e.g., Ysseldyke & Christenson, 1994; Ysseldyke & Christenson, 2003) and the need for disabled students to have well-structured interactions with and the respect of their peers (cf. Hocutt, 1996; Nind & Wearmouth, 2005), were not addressed in their programme. Nor were teachers being empowered to be able to adapt the goals and assessments for individual students (cf. Barton, 1993; Bines, 1993; Oberg, 2005). These have been found to be key skills teachers need if they are to feel competent to buy into inclusive education. At the time of the current study, both regular and special educators were still feeling ill-prepared to serve disabled children in regular settings.

Experiences in other countries have shown that without the buy-in from teachers, schools do not change and inclusive education becomes merely the placing of students with disabilities in regular education classrooms (Low, 1997; Mittler, 2000; Muthukrishna, 2000; Slavin, 1990; Slavin & Madden, 2000; Wedell, 1992).

### *Concept of “other”*

Derrida (1982) proposes that language used for communication shapes the meaning of what it is describing and suggests that when this is contrasted to clarify what it is not, it evokes the concept of *other*. As discussed in chapter 2 (see 2.5.1), Foucauldian theory proposes that discourse constructs a certain version of events which creates subjects who are then possibly subjugated by others or dependent on others (Foucault, 1979, 1983). Foucauldian consideration of pedagogical policy and practice, with its focus on power relations, allows for a detailed analysis of the multiple factors that affect the schooling of children.

Participants in the current study were still subjugated (cf. Foucault, 1979, 1983) and lived with their designated role of *other* (cf. Derrida, 1982), humbly accepting the inferior status that those functioning in a moral discourse apportioned them. Discourses can be powerful determinants of what is socially acceptable, what is considered normal and viewed as correct (Derrida, 1982; Harrison et al., 2001). Within the moral or medical discourses around disability, the disabled are seen as the *other*, as being different and requiring, therefore, separate education. This was the foundation upon which the pre-democracy system in South Africa was built.

In trying to honour the principle of human rights subsequent to democracy, the intention was to move away from a conceptualisation of disability that designated the disabled as *other* and to introduce inclusive education where the disabled would be seen as part of *us* (e.g., Hedlund, 2000). The principle of individual rights being protected was the intended pedagogical outcome articulated in *White Paper 6*. However, the interim steps of the 20 year plan still promote a conceptualisation of the disabled as *other* than the rest of society. Findings from the current study indicate that this component of *White Paper 6* seemed to sanction continuing exclusionary suppositions and practices to remain entrenched.

Where inclusive education has successfully been achieved, collective belonging, respect, and equality are promoted (Thomas & Loxley, 2001) which respond to diversity (Barton, 1997) so that there is no longer an *us* and *them* dichotomy (Booth et al., 1998).

### ***Equity***

Inclusive education is founded on a philosophy of acceptance (Reardon, 1994) and tolerance (Mittler, 2000). It follows, therefore, that two systems of education, one for disabled students and one for their non-disabled peers is inherently inequitable (W. Stainback et al., 1989). Special education needs are not attributed solely to intrinsic disabilities, like blindness or neurological dysfunction of some sort, but extrinsic factors such as poverty, language, the impact of the HIV/AIDS pandemic, and abuse are included (Department of Education, 2001; Donald, 1993). Barriers to learning for all students are identified, addressed, and eradicated (Booth et al., 1998).

It was on the principles of equity and human rights that *Consultative paper no. 1 on special education: Building an inclusive education and training system* (Department of Education, 1999) was based. Teachers in regular schools and the disability movement itself expressed such deep concerns about the proposed initiative, however, that the interim steps of the 20 year plan were included in the final White Paper to ensure step-by-step interim measures until fully inclusive education can be achieved.

The outcome at the time of the current study, was that inequity was apparent not only within and across sectors and schools depending on which community they served, but also in the provision for disabled students. These students were still largely excluded from regular schools, but special education was not free and therefore inaccessible to many. Support document addressing these issues (Department of Education, 2005a, 2005b, 2005c, 2005d, 2005e, 2005f) and implemented subsequently, provide further support for advancing the implementation of *White Paper 6* thereby redressing inequities.

### *From reconceptualist to incrementalist*

The ANC altered course from a solely reconceptualist quest for an inclusive education and training system and included interim steps epitomising an incrementalist approach (Doyle, 2003). This exposition in *White Paper 6* reflects the acceptance that inclusion of the disabled in regular schools would be more appropriate as the democracy strengthens and a liberal democracy is achieved, where people become able to exercise their democratic right at a richer and deeper level than that of casting a vote (Daniel, 2000; Diamond, 2000; Karvonen & Anckar, 2002; Pastor, 2000; Plattner & Espada, 2000; Rapoport & Weinberg, 2001b). When people grow used to exercising their right to having a voice on all issues, when true democracy and the protection of minority groups and the honouring of their rights becomes reality, when the discourse in society has changed to the point that there is a social construct of disability and disability is seen as part of the normality (cf. Ainscow, 2005; Slee, 1997), then the implementation of inclusive education for the disabled is likely to be more successful. Then the call for inclusive education would come from the people, from the disability sector; it would not be an initiative imposed in a top-down model.

### **5.5.7 Summary**

In the USA and UK, where there has been the successful implementation of inclusive education, this *followed* other human rights initiatives. While this is not necessarily a prescriptive sequence, inclusive education in those countries was predicated by emancipation in many areas and members of minority groups had been assured of their protection collectively and their advancement individually. In South Africa, the major human rights achievement was democracy itself, indeed, but initiatives protecting minority group rights have been more difficult to achieve in the new democracy. It gives rise to the question of whether this sequence of events is a crucial element.

In South Africa, the overwhelming jubilation when social justice was achieved with the first free and fair elections perhaps prompted the policy writers erroneously to assume that the general population was ready for further emancipatory legislation, promoting the advancement of minority groups. As Hay (2005) argued, *White Paper 6* bears

testimony to the idealism which swept the country in the years after the first democratic elections, where inclusive education would evidence the culmination of the struggle for human rights in South Africa. It was hoped that this legislation would *lead* in the march from democracy to a liberal democracy. The reality was that in KZN, at the time of the current study, at a micro-level, society did not seem ready for this initiative. Too many people were functioning in a moral discourse (Berg, 2003; Gill, 1999; Tregaskis, 2002) or medical discourse (Allan, 1999; Fulcher, 1989) around disability and too few espoused a social construct of disability (Gill, 1999; Hasler, 1993; Slee, 1997). The unchanged beliefs on the part of many, led to continued ostracism of the disabled.

Furthermore, too few of the rural poor were able to exercise their democratic right beyond casting a political vote (Daniel, 2000; Diamond, 2000; Pretorius & le Roux, 1998; Rapoport & Weinberg, 2001a), and were therefore not able to access education of any sort for their disabled children.

More importantly, too few supports had been put in place in regular and special education (Lipset, 2000; Muthukrishna, 2000; Muthukrishna & Sader, 2004; Sayed & Soudien, 2005; Swart et al., 2000). *White Paper 6* outlined the role of special educators in special schools that would become resource schools. They would continue to meet the needs of severely disabled students who would attend the resource school. They would be required to offer support to teachers at nearby full-service schools who, for the first time, would be including disabled students with moderate needs in their regular classrooms. They would, furthermore, be part of the District Teams which “will provide the full range of education support services, such as professional development in curriculum and assessment, to ... institutional-level support teams” (Department of Education, 2001, p. 49). The expectations for these specialists were unrealistic, precipitated in part by the “lack of human capacity” (M5, transcript 18). Too many other financial constraints (Bratton & van der Walle, 1997; Du Toit, 2001) were preventing government from allocating sufficient funding to enhance the likely success of inclusive education. Furthermore, with the limited resources and the dire need to improve basic facilities under the requirements of *White Paper 6* which were barriers to

learning for many students, the disabled had become lost in the wide definition of need and, consequently, in many cases their educational needs were not being met.

A further point of difference between South Africa and the UK and USA lies in the ability of the disabled to have recourse to law in face of discriminatory practices. In the USA, for example, IDEA is unequivocal in articulating the right of children to access regular education. In South Africa, the inclusion of the 20-year plan to specifically meet the needs of disabled students in *White Paper 6*, has limited the power of the disability movement to have recourse to law under similar circumstances. Schools have the legal right to set their own enrolment policies, and if they have not been designated as full-service schools, they are not obliged to enrol students with disabilities.

Nevertheless, for South Africa to have made the paradigm shift from exclusionary to inclusionary legislation in education is important and laudable in that the foundation has been laid at a macro-level. It is in the implementation at a micro-level that difficulties are being experienced. In this regard, South Africa is no different from the USA, the UK, or any other country, since each country has experienced its own challenges. It seems that in countries where there is a social construct of disability at a micro-level as well as a macro-level, and there is sufficient funding, inclusive education is more readily achievable. Where these are lacking it would seem that the needs of the disabled might better be met when they are identified as a discreet group and funding can be specifically allocated to meet their needs. When this becomes possible in South Africa and the majority of the population honour minority rights, then the legislation and infrastructure are already in place for inclusive education to be achieved.

## 5.6 From the Field of Inclusive Education, to Case, to Generalisation

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### 5.6.1 The Field

Inclusive education is part of the larger issue of inclusion in society. From the literature, it is possible to identify certain critical elements at a macro- and micro-level that will facilitate the achievement of inclusive education.

At a macro-level, some key aspects include but are not limited to, the need for

- i. there to be a liberal democracy where minority rights are protected by law;
- ii. a social construct of disability;
- iii. legislation to represent the collaborative desires of society;
- iv. sufficient funding;
- v. regular education to be in a robust state;
- vi. there to be mechanisms of evaluation of the system if inclusive education initiatives are to be sustained.

While there is a web of interrelated factors at a micro-level which enhance the likelihood of successfully including students with disabilities in regular settings, nine key elements were distilled from the literature review (see 2.2.4) as pivotal to successful inclusion. At a micro-level, key aspects seem to differ slightly from site to site but, while not limited to these, include the following:

- i. teachers supportive of inclusion;
- ii. visionary leadership;
- iii. appropriate funding for resources;
- iv. collaboration with all stakeholders;
- v. staff development;
- vi. ongoing support for teacher and students;
- vii. positive parental involvement;
- viii. appropriate use of assessment;
- ix. appropriate adaptation of the curriculum and instruction.

If one considers the USA and the UK in relation to these elements, at a macro-level all the elements have come to be evident. These countries have both been liberal democracies for a long time, the disability movement has succeeded in promoting a social construct of disability and consequently inclusive education legislation has been promulgated which represents the desires of those societies. Both these capitalist countries are relatively wealthy and in a position to fund the legislation they have put in place. Regular education in both countries, while there are ongoing efforts at improvement, is in a settled state. Both countries recognise the need for constant evaluation if the inclusive education initiative is to be sustained.

It is the micro-level requirements that determine the translation of policy into practice and this is where there is variable success, depending on how many of these factors are present at any given site.

### **5.6.2 The Case**

The current study can be viewed as one case set in a small area, a section of KZN, of a large developing world country, South Africa. At a macro-level, South Africa is not yet a liberal democracy. While protection of individual and minority rights is enshrined in legislation, this is not reflected in the daily lives of many of the population. The fear of ostracism, a loud clarion-call from all participants in the current study, reflects that many South Africans do not espouse a social construct of disability, but function in a moral or medical discourse.

While participants in the current study all supported the legislation and philosophy of inclusive education, reluctance to embrace it in practice stemmed from the conviction that resources would be insufficient for it to be successfully implemented. Regular education was, furthermore, in a state of flux as teachers were still coming to terms with OBE. Mechanisms for evaluation of progress towards policy ideals are still in the process of being developed.

At a micro-level, as is the situation in the USA, UK, or any country, there was variable evidence from site to site, of the elements required for successful inclusion, and variable evidence of inclusion. This is also the case in the present study. To illustrate, Appendix a provides a brief synopsis of each of the ten schools which took part in the current study. This incorporates a description of each school, the positives as described by the teachers at that school, challenges to education as they saw it, and their feeling about inclusive education. These ten schools are now profiled against the nine identified micro-level elements necessary for successful inclusion of students with disabilities. A five-point rating scale is used: ranging from ++ representing excellent, + representing good, = representing adequate, – representing poor, to – – representing inadequate.

Table 5  
*Ten Schools Profiled Against Key Elements for Successful Inclusion*

Schools	Staff philosophically supportive	Visionary Leadership	Adequate funding for resources	Collaboration with all stakeholders	Staff development	Support for teachers and students	Positive parental involvement	Appropriate use of assessment	Adaptation to curriculum and instruction	Outcome
B	++	+	++	– –	++	++	++	+	+	Inclusion
K	++	++	++	++	++	++	++	+	+	Inclusion
H	–	–	–	–	–	=	–	–	–	Minimal inclusion
C	–	–	+	–	–	=	+	–	–	Minimal inclusion
A	=	–	– –	– –	–	–	– –	– –	– –	Inclusion by default
J	+	–	– –	– –	– –	– –	– –	– –	–	Inclusion by default
G	+	–	–	–	+	=	+	=	=	Exclusion in regular setting
D	–	+	–	–	–	=	–	=	++	Exclusion – Special school
E	+	+	–	–	+	=	–	+	++	Exclusion – Special school
F	+	+	–	–	+	=	–	+	++	Exclusion – Special school

As discussed in chapter 4 (see 4.4.2) inclusion by default resulted in inclusive education being a dump-and-hope (Corbett, 2001) experience for disabled students where they became a burden for both teachers and peers (Charema, 2005). Minimal inclusion was evidenced in those settings where the disabled child had to fit the existing systems, parents funded a teacher aide, and no adaptations or accommodations were made for the child. Exclusionary settings of special schools and the satellite unit provided for students' educational needs but did not meet their social or cultural needs adequately, nor was this type of education accessible for the majority of the population because it was not free. Only in School B and K was there inclusion close to that envisioned in policy documents. These were wealthy private schools, which enrolled children from grade 1 to grade 12. Students with disabilities were not included at a secondary level; they remained in the primary classes until they were ready to leave school.

Findings from the current study, therefore, mostly confirm the criteria derived from the literature in chapter 2. The more of the macro- and micro-level elements that were present at a given site, the greater the likelihood of there being successful inclusion of students with disabilities.

There were two issues, however, that the current study brings forward that the underlying literature did not sufficiently attend to. These are as follows:

- i. Discourse around disability amongst the general population. The disability movement in South Africa has a social construct of disability, as did policy writers, educated professionals, and international disability groups all of whom were consulted in the development of inclusive education policy. What had not been sufficiently realised, and therefore catered for, was the necessity for the bulk of the population also to have social construct of disability. Without this crucial element, policy does not provide a means to counter ostracism of the disabled and the fear they experienced as a result. *White Paper 6* alludes to the hundreds of disabled children locked in sheds and fear experienced by the disabled and how this should not be. Findings from the current study emphasise the vital importance of a *majority* in society having a social construct of disability, not just those involved in macro-level

consultation, in order for successful inclusive education to be achieved. Had policy writers been aware of this, they might have prioritised their information and advocacy programme to a greater extent. They might also have instituted further aligned initiatives.

- ii. “Barriers to learning” approach to inclusive education serves a majority, but the disabled can become lost. In South Africa where resources are limited, the removal of barriers to learning for many students centres on what developed world countries would take as a given, such as the provision of toilets and electricity. In developed world countries, such as the USA and the UK, where there are not additional resource pressures, it has been possible to have a wide definition of need within inclusive education and, in approaching education from a barriers to a learning standpoint, it has been possible to include disabled students in many instances. Findings from the current study bring forth the need in developing world countries for specifically tagged funding for the disabled, who will always be a minority group, or their needs become overshadowed when priorities lead to a removal of barriers to learning for a majority of students.

### **5.6.3 Generalisation**

It was not the intention at the outset of this study to provide a prescription for successful inclusive education in KZN or elsewhere. It is, nevertheless, possible to extrapolate some key points from the preceding discussion and to highlight some pointers that the current study provides which might prove useful for other developing world countries as they, too, strive to achieve inclusive education.

In South Africa, the collaboration between policy writers, government officials, international and national representatives of the disability movement, and teachers at both regular and special schools was comprehensive (Department of Education, 1995, 1997, 1998, 1999, 2000, 2001). This ensured support for the philosophy on which *White*

*Paper 6* was founded from all educated stakeholders. This has proved to be an absolutely crucial aspect in the development of policy.

Once policy has been agreed to, however, there is the need for further collaboration at a micro-level on how best to translate policy to practice, to woo teacher buy-in. Also, because it is seen as a journey or a process, not an event, it is necessary for there to be a mechanism for teacher feedback to be addressed and reconciled in a collaborative model. Otherwise, as was the case at most schools in the current study, it is seen as the imposition of policy in a top-down model and there is passive resistance on the part of some teachers.

Policy has to work at a macro-level, but it also must work at a micro-level. The policy to practice nexus is always going to be problematic and the specific challenges idiosyncratic. Consequently, it would be useful to have a framework for self-review and critique applicable for the specific country, such as the one being developed from the British *Index for Inclusion* which is being contextualised for South Africa (Engelbrecht et al., 2006).

For the majority of learners, the philosophy of identifying barriers to learning as an approach to inclusive education is ideal. The principles of human rights and equity find resonance with the grass-roots stakeholders at a micro-level as well as with consultants and policy writers at a macro-level. A strength of *White Paper 6* is that it has specific provision for the disabled within the policy, otherwise the disabled would in all likelihood become totally lost in the barriers to learning approach to inclusive education.

For students with disabilities, however, findings from the current study suggest:

- In the interim, it might be expedient to have the elements of the 20 year plan nationally administered. It seems that inclusive education is contingent on there being a liberal democracy where protection of minority rights becomes the norm. This has proved more problematic to achieve in the developing world, but again, an ideal to which most aspire. Findings of the current study suggest that the disabled become lost in a barriers to learning approach to inclusive

education. Consequently, if the 20 year plan steps were to be considered, as an interim measure, as a separately funded initiative, two advantages occur: (i) the reconceptualist approach to inclusive education, with a wide definition of need and a focus on removal of barriers to learning, will not be contaminated or weakened with a section embedded which addresses the steps to be taken to meet the needs of the disabled, and which resides in contrasting paradigm; and (ii) it will be possible to ensure disaggregated funding specifically for the disabled to ensure their needs are better met. This interim measure could function until the situation in regular education makes the inclusion of the disabled in regular classrooms an exercise that meets their needs, rather than simply to place disabled children with their peers causing undue burden for teachers and peers (cf. Charema, 2005).

- With the needs of the disabled considered specifically, with separate funding, it would be possible to take a more incrementalist approach to achieving ultimate inclusion for them. Participants in the current study were fully alive to the irony of suggesting segregation of any sort in the South African context particularly, of creating a group to be viewed as *other*. They acknowledged the clash of paradigm (cf. Mitchell, 2001), the incongruity of theory, but in the socio-historical moment they found themselves, this was considered the only practicable solution. This aligns with a UNESCO funded study currently being undertaken in Uganda which, “despite the strong wish and intention to educate all learners in inclusive schools, argue[s] that there is still a need for special schools in Uganda” (Kristensen, Omagor-Loican, Onen, & Okot, 2006, p. 139). Participants in the current study envisaged that with specifically targeted funding for students with disabilities, there was a greater likelihood of progress being made with this educational initiative. By strengthening special schools, the needs of the disabled could better be met in the short and medium term. In time, provision for the disabled would be covered within the *White Paper 6* funding. Separate funding for disabled students would then become redundant.

- The 20 year plan initiative for meeting the needs of the disabled in education could be administered by the National Education Department, with greater accountability and easier tracking of funding until such time as it became fused with other inclusive education initiatives, when funding could be re-allocated to the nine provinces for administration. Participants in the current study were concerned that with one lump sum being devolved to provinces for health, education, and welfare, that the struggle for equitable funding to meet the needs of the disabled in education would be fought, yet again, in nine different provinces. If it were administered nationally, they felt the funds would reach the intended learners more directly.

There are parallels between the suggested national administration and funding of the 20 year plan and the National Schools Nutrition Plan. At the time of current study the nutrition plan was administered at provincial level. Research showed, however, that “over the past ten years, the number of children actually reached by this programme has decreased by nearly one million. This represents a decrease of around 20%, not allowing for population growth” (Kallman, 2005, p. 10). There is, consequently, a move to administer the nutrition scheme nationally to overcome the weaknesses of coordination (Leatt, Rosa, & Hall, 2005) and to ensure the funds allocated to the scheme reach the children in need. The same seems to hold true for the implementation of the 20 year plan for disabled students. If this, too, were nationally administered, the same envisaged benefits might more readily accrue to children with disabilities.

- New schools have access for all. New schools should have access for physically disabled students as teachers find it easy to include these students, who need minimal adaptation to curriculum or instruction. Participant M4, who had been an ANC education policy writer between 1990 and 1994, spoke of the schools which would have to be built to accommodate the burgeoning population and also the moderately disabled students currently not in schools. He envisioned schools built to accommodate wheelchair users and students with other physical disabilities, which could later “open up, open up. Open up those

schools for the disabled. Open them up for normal kids [*pause*], that's how you get integration" (Transcript 17).

- Initial teacher education focuses on including the disabled. Initial teacher education that adequately equips teachers for change, would include a means of challenging assumptions and beliefs over the years of their study. It is not possible to legislate for people's beliefs but teachers need to believe in the right of disabled students to be included and they need belief in their ability to meet diverse needs (cf. Andrews & Lupart, 1993; Corbett, 2001; Fullan, 1991; Guskey, 1988).
- Implement initiatives to counter the ostracism so feared by the disabled. Information and advocacy programmes are considered vital. With the efforts of the international and national disability movements, it is likely that a social construct of disability will be achieved in time and this important aspect can be expedited with information and advocacy programmes.

These suggestions, while not comprehensive enough to be used as a prototype for inclusive education in developing world countries, might prove to be a useful platform on which to build.

## **5.7 The Study in Context**

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### **5.7.1 Positive Features**

- The current research took place in a limited geographical area so that the information that was gleaned might be deeper and more situationally contextualised than if the study had spanned a wider area in South Africa.
- The methodologies utilised allowed the participants authentic voice which was an overriding consideration in the current study.
- Partnership with participants was established, strengthened over time, and remains a solid platform for further research.

### 5.7.2 Operating Parameters

- The current study took place over two years – that is, one tenth of the 20 year plan for inclusive education. If data were to be collected over a more extended period, it would be possible more precisely to document progress of the implementation of *White Paper 6*'s 20 year plan and to explore the effect of supporting documentation (Department of Education, 2005a, 2005b, 2005c, 2005f) on the implementation.
- In addition, the voice of non-disabled students and their parents were not included in this study. Their perspectives might have been illuminating and provide a deeper insight into the ostracism experienced by disabled children in certain sectors of society.

### 5.7.3 Further Research

In light of the findings and the operating parameters of the current research, the following are suggested for further research:

1. It will be important to evaluate the success of resource- and full-service schools within an incrementalist model once they have been established and had time to function in those roles for a time. A particular focus could be the effectiveness of special educators at resource schools in providing strategies and support for those teachers at full-service schools who are including students with disabilities.
2. It would be illuminating to seek statistical information indicating whether the interim steps as articulated in *White Paper 6*, which are being implemented, are leading to a greater number of disabled students, particularly the rural poor, being able to access education of one sort or another.
3. It would be advisable to evaluate the success of the launch and continuation of the advocacy and information programme which could lead to changed beliefs and the development of a social construct of disability which seems to be necessary for inclusive education to be successful.

4. A new dimension would be gained if the beliefs of non-disabled peers and their parents about disability and inclusive education were investigated.
5. It would be interesting, as further steps are taken towards inclusive education, to consider again the attitude of special educators. The current research considered their reluctance to embrace the changes, as has been found to be the case internationally (Burnstein et al., 2004; Fisher et al., 2003; Lamar-dukes & Dukes, 2005). The participants in this study were convincing in the reasons they put forward for their stance. Once the resource issues have been addressed and the country has moved towards a social construct of disability, however, it would be useful to investigate whether they are still reluctant to change their roles which would point to self-efficacy issues as found in other studies, rather than their current concern for student welfare.
6. Another perspective would be gained if members of Psychological Services were to be a participant group in a study to establish what they believe their mandate and scope to be in terms of the aims of *White Paper 6*.
7. It would be illuminating to establish to what extent the support documents (Department of Education, 2005a, 2005b, 2005c, 2005d, 2005e, 2005f) were enhancing the achievement of inclusive education.

It has been a courageous journey that South Africa has taken in coming through the apartheid barriers into democracy. The journey into full inclusive education is also one of social justice and one which is driven by the desire for equity. The values embodied in the constitution, of "equality and the advancements of human rights and freedoms" can come to fruition by ensuring "that all learners, with and without disabilities, pursue their learning potential to the fullest" (Department of Education, 2001, p. 11). There is ample evidence of the resolve of the people of South Africa in their struggle for democracy. The road to inclusive education is being addressed with equal determination and energy in many quarters and has good prospects for success. Gxila impela isizwe sinamandla!<sup>1</sup>

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<sup>1</sup> Stand firm, great nation!

## 5.8 Summary Encapsulated in the Words of a Child

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Some of the tensions discussed in this thesis were compellingly expressed in a poem written by a student at a special school whose teachers took part in the current study. These few words from a child reflect the impact of the legacy of apartheid, touch on the challenges in a developing world country, and articulate the hope that lives in individuals' hearts. This child was seven in 1994 when South Africa achieved democracy and she was 17 when she wrote this poem. It is appropriate that the final words of this thesis are those of a child.

### **Rainbow Nation – My Pot of Gold?**

Mandela said we are the Rainbow Nation  
Jubilation  
Celebration on the streets  
Ijuba flowed in nerve numbing torrents  
Down eager throats  
Toyi-toyi-ing thronging masses  
Danced and laughed the night away

In my heart the flame of hope  
Flickered, and leapt  
Did that mean me?  
Could soft Rainbow colours brighten  
Deformity?  
Lighten the disastrous burden that is me  
In a way that was never possible  
In the time when people saw only in  
Black and White?

Seven then  
Seventeen now  
My wheelchair does not  
Seem able  
Try whatever which way I can  
To travel the road  
Of the rest of the Rainbow Nation

The flickering flame burns low  
But at times I think  
I can still  
Make out the form  
Of the pot of gold  
At the end  
Of the Rainbow

Is it to be for me too?

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## **Appendix a**

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### **Description of Schools that Took Part in the Study**

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#### **School A**

##### *Description*

School A is a regular, low SES, rural, co-educational school an hour's drive West of Pietermaritzburg. It gets funding from government for teachers' salaries but relies on donations and school fees to cover the running costs and the cost of resources. The school includes a preschool and grades 1 – 12. There are two classes at each year level and class sizes in the preschool and primary school range from 47 to 66 students. The teachers are multi-ethnic and all students are Black.

##### *School A positives*

Many of the staff have been teaching at that school for a number of years, and a stable staff is usually indicative of a happy staff. The reasons they put forward for their job satisfaction is the general demeanour of the children who, they say, are more respectful than the children at some other schools they know of. They feel a great sense of achievement at the progress their students make particularly in overcoming the language barriers, as the medium of instruction at the school is English but all the students have isiZulu as their home language.

##### *School A challenges*

These teacher's main challenge is that of class size when combined with social issues of poverty and the impact of AIDS. These teachers clearly see educational needs as being more than just learning needs. They explain that amongst the children in their classes are likely to be those who are inadequately fed, those who are emotionally upset, and those who have learning difficulties. Teachers mention that the social issues, causing some of their students to be under emotional strain, are a source of frustration for them, as trying to meet these emotional needs is difficult given the number of students in the class.

They mention the cramped conditions in classrooms built to accommodate 35 students, where there are now 66 crammed in, making it very difficult to contemplate group work. They see the constraints of the physical amenities as negatively impacting on their practice. They see the implementation of OBE as restrictive and problematic because they do not have a good understanding of the premise on which it is based, nor how specifically their practice should change. They are not sure if they are doing OBE at all and, if they are, whether they are doing it correctly.

The reason for the large classes, they maintain, is because all the teachers at their school are educated which, as a later interview described (School J), is not always the case. Furthermore, they note the good matriculation (matric) results their students achieve as a further reason why so many parents want their children to attend this particular school in preference to others in the area.

A further challenge these teachers note is the lack of partnership with parents particularly when it comes to parents accepting that their child has a problem. As the following excerpt demonstrates, parents have to accept that their child has a physical disability as it is there for all to see. They are not, however, accepting of their child having an intellectual impairment, possibly because they would then have to remove the child from this school. They note the social implications and stigmatisation of having a disabled child.

- R: So would you say there are more that have got learning difficulties and developmental delay than have got physical disabilities?
- T5: Yes. Most parents they don't like to accept that their children have any difficulties.
- T4: So if they have physical disabilities they accept that. So when the parents accept their children, then those children come to school, the other children also accept them. Ja, but when the child got a mental disability it is quite different.
- T7: Just to add on to what T4 was saying. I think one of the main problems is the parents don't want to accept that their children are different.

### *School A and inclusion*

The discussion on the inclusion of disabled students was very interesting. These teachers are enthusiastic about the notion of including students with physical disabilities but, at the same time, note matter-of-factly that students using wheelchairs would not be able to come to their school as there are no ramps. They see students with intellectual disabilities as posing a greater problem. They do not see themselves as having the autonomy and authority to have different learning outcomes, perhaps life-skills, for intellectually disabled students. Rather, they see themselves as having to continue with the regular curriculum and the child as failing to progress with those learning outcomes. They would like to see those students replaced in special education, partly because of the child's lack of progress with academic learning outcomes, and partly because of the disruption caused to the other class members as shown in the quote below.

T1: I still think it's the disruptive side of the psyche of these children. You know, this little fellow, he [pause] he'll just get up and start wandering around, and pick up somebody else's crayons and stare at them, and they do what they like. I really think they need to be [pause] also in a controlled environment. But maybe learning different skills.

T2: Life skills rather than academic skills.

T6: Yes, because you know, a lot of the time is spent on learning and he just doesn't cope. His mind is, really, somewhere else.

When discussing the notion of inclusion for all students there was general scepticism about this being achievable in practice.

T3: But a special school will be good for them. There they can help them like we can't help them.

T1: Yes, you see, there's that, but the rest of the world is saying that we must have all the children in our classes.

T4: But then the rest of the world doesn't have 60 plus children in their classes, do they?

### ***School A suggestions for improvement***

The suggestions these teachers put forward to improve their school include more buildings and teachers so that they can accommodate all the children wanting to attend their school, while keeping the class sizes manageable. They also want a remedial classroom with a remedial teacher who could have groups of children with learning difficulties in a withdrawal situation.

None of the teachers had heard of the information and advocacy programme described in *White Paper 6*. A popular suggestion was community education to try and stop the stigmatisation attached to disability in society, so that parents will be more accepting if their child is disabled. All of this would then, in their ideal world, lead to the child with intellectual disabilities being removed from their school and placed in special education. Part of the justification for this exclusionary stance is that the child will benefit from specialised tuition from an expert who will develop appropriate learning outcomes for the child, and part of it is the relief they would feel at not being expected to cope with such a child in their present circumstances.

## **School B**

### ***Description***

School B is an urban, monastic, high SES, regular, private school which has students from age 4 in the preschool to 18 in matric. This school has a boarding facility but most of the students are day scholars. As it is a private school, it is not reliant on government for any funding. The fees and the trust, which set up the school, cover all costs including teachers' salaries. There are 700 students at the school, all from high SES homes, although there are a few students from lower income families who have won a scholarship to attend this school. The staff is multi-ethnic with a majority of White teachers; the students are multi-ethnic with a majority of White students.

### ***School B positives***

The imposing gates are opened by a guard. The ivy-clad buildings exude charm and elegance. Shady areas for students surround manicured fields and a crystal clean swimming pool. It is a lovely setting. Teachers are proud to teach at this school.

Teachers see small, manageable class sizes of around 20 students as a positive, resulting in excellent matric results. The high SES of parents is seen as a positive since they can afford for their children to be involved in many sporting and cultural co-curricular activities, providing them with a rich liberal arts education. A very capable, dedicated, stable staff is put forward as a measure of the happiness of the teachers and their appreciation of a supportive working environment. The students' positive attitude to school and their pride in the school lead to generally highly motivated and well-behaved student body.

### ***School B challenges***

Teachers noted as a possible challenge the need to prepare students to be able to function in the *real world* on leaving the protected environment of a private school. Other than that, no challenges were mentioned.

### ***School B and inclusion***

School B is built on many levels and has many stairs. Therefore, it is not possible for children in wheelchairs to contemplate coming to this school, not that the school is against accommodating children with physical disabilities. Indeed they have one child with spina bifida who has quite high levels of need, including assistance with a permanent catheter. This child is fully included in all aspects of school life. In some classes there are a few children with mild to severe learning disabilities who are supported in-class and, after assessment, sometimes in a withdrawal situation by a qualified remedial teacher. The remedial teacher organises occupational therapy and speech-language assessments with experts for those children who might need further assistance and therapy is provided for them after school. There are two children with intellectual disabilities who follow their own programme with specific learning outcomes tailored to their strengths and needs. Being a private school, there is the flexibility to alter learning outcomes and not adhere strictly to academic learning

outcomes. There is a willingness on the part of the school and the teachers to include children with disabilities.

## **School C**

### ***Description***

School C is an, urban, high SES, monastic, regular high school. There are 1200 students at this school, of which 207 are Black, 37 are Coloured, 84 are Indian, and 75% are White. The staff is multi-ethnic, the majority being White. Most students pay the school fees and consequently the school is able to employ sufficient teachers to keep class sizes to between 30 and 35 students. Class sizes would otherwise be 60. The school has a long history of excellent academic and sporting achievement amongst its students. This is an old, well-established school with excellent academic, sporting, and cultural facilities.

### ***School C positives***

The generally positive attitude of students who are proud to be members of this school community is seen as a positive, as well as the good academic results the students achieve. Strong traditions mean that students are generally very well behaved and motivated to achieve. Teachers are happy to be employed at this school. Many of the staff have taught at this school for tens of years, which is indicative of their job satisfaction. The excellent facilities and opportunities for students to participate in co-curricular activities, leading to a well-rounded education, are mentioned as an advantage of this school over others.

### ***School C challenges***

The main challenge mentioned is the implementation of OBE which is seen as having a negative effect on the students' learning. The inefficiency from the KZN and National Education Department is seen as frustrating. These teachers do not see OBE as progressing the education of their students, whom they consider relatively privileged, and they see it as being ineffectual in improving the education of those who were previously disadvantaged under apartheid.

### *School C and inclusion*

This school of 1200 students has a minimal number who are disabled. There is one student who has an artificial leg. One who has a cochlea implant and is hearing impaired was due to start at this school the following year. These students have been accepted into the school because of familial links to the school. They would otherwise not have been accepted. These teachers feel that at secondary level, with the increased administration generated by OBE and the continued high expectation of parents despite larger classes, it is unrealistic to expect teachers to adapt programmes or practice to accommodate the needs of students with disabilities. They are not opposed to the notion in theory, but note the costs as prohibitive when they are struggling to maintain standards with constantly rising costs as it is. Until they see the supports, financial and in teacher education, they would rather preserve the status quo and have separate schools for students with disabilities.

## **School D**

### *Description*

School D is a rural, low SES, co-educational special school with boarding facilities for all students. There are no day scholars. The school accommodates 300 students, half of whom are visually impaired and half of whom are physically disabled, mainly as a result of cerebral palsy, trauma, or spina bifida. They do not cater for students with intellectual impairment, but increasingly they find that students with multiple disabilities are applying to be accommodated in this school. The teachers are multi-ethnic and all students are Black.

This school gets government funding and also donations from the public. Class sizes range from seven, which is rare, to 21 and the average class size is 18 students. A teacher of the blind has students who are blind or visually impaired and who may also have another physical impairment. Other teachers have sighted but physically disabled students.

They withdraw students with learning disabilities for tuition whether sighted or not. Students at this school are aged four to 18, and the school goes from grade 1 to grade 9. Students who are successfully achieving in the academic stream go to other schools for grades 10 to 12 and they write matric there. Students who are able to cope with an academic programme have the same academic learning outcomes as their counterparts in regular education. Those who cannot cope with an academic curriculum are provided with a pre-skills and then a senior skills curriculum.

The school shows a level of flexibility in their attitude to medium of instruction. The official medium of instruction is English, but teachers help students in the initial stages by using isiZulu and gradually implementing English as the medium of instruction.

### *School D positives*

These teachers find that this system allows students to be given good opportunities to remain within an academic curriculum and they note with pride that a good number (unspecified) of their students go on to write matric. If students are not successful with academic learning outcomes then there are alternatives for them in the skills department which teachers enthusiastically endorse. They also feel it is a system which optimises teacher expertise and allows for a flow of students back to academic classes from remedial or skills departments if they make academic gains.

T18: I'm a remedial teacher and I have had a mix of remedial and special class learners, a mix of blind and physically disabled.

R: Oh, I see, is that students who have um reading difficulties or learning difficulties as well as ...

T18: Yes, we are trying to build up a centre. The school is trying to build up and geared to go very much for skills, skills training. And at my level, in my little remedial group, we have children who are obviously not coping and have been failing at the foundation level. So now we are giving them time and working on what they can do to find out if they have potential for skills. We have been blessed to have one kid have a breakthrough, a blind child. A breakthrough is, um, was whatever was obstructing him and he has broken through and he is learning well, and he is slowly improving so that he will go back into the academic.

This opportunity for students to move from academic to specialised classes and back is seen as a unique and positive feature. It mirrors the flexibility the school demonstrates regarding medium of instruction

### *School D challenges*

When there was still a separate special education department, teacher to pupil ratios ensured fewer students in each class. Now, with the merger of regular and special education under one department, they are coping with 18 or more disabled students. They experience a level of frustration at not being able to meet individual needs to the extent that they would like. They are understaffed and for this reason class sizes are higher than they consider optimal. They find the implementation of OBE problematical as they are not sure exactly what is expected of them. They report having completed a year plan following initial instructions and then being required to change it after they have completed planning. They find the system inefficient.

Teachers cited the level of poverty in KZN and the impact of AIDS as further challenges. They note the cost of even the heavily subsidised boarding fees as prohibitive for many families who live in poverty. They know of many who cannot afford to attend this school and many of those children are not in education at all as they are not accepted into regular schools in the area where they live. They note that even the cost of travel to bring the children to the school for initial assessment is beyond the means of many families.

A further challenge for them is the lack of education amongst the general population about their school. They often come across parents, who bring a 13 year old child for assessment, who say they didn't know there was this school and they didn't know their child was eligible to attend this school. The teachers cite the lack of communication across providers and government departments as problematical. They maintain that if a child is severely physically disabled, the child will probably have been in the hands of some sort of expert like a physiotherapist or welfare officers who provide a disability grant to the family. They maintain these support agencies should adopt a more educative role, explaining to their clients the full range of options available for their children's education.

### *School D and inclusion*

These teachers were negative about the notion of inclusion because of the attitude of society towards the disabled. They feel that by the time their students are 18 they will be better able to cope with any negative attitudes from their peers

Another point these teachers mention is that many of their students are behind academically because their disability causes them to be hospitalised for long periods. These teachers are willing and able to adapt to the needs of individual children who are behind for this reason. They do not think that this type of accommodation would take place in regular education.

These teachers have a great sense of pride in the school, in the programmes they offer, and in the achievement of their students. They do not see their students being able to reach, in regular education, the levels they achieve at this school.

T22: Yes, so then from there when they leave our skills department we have got a very wonderful therapy section where they send them to technical colleges sometimes to places where they can work in sheltered workshops. They work really hard on placing the students.

Teachers explained their exclusionary stance in terms of unemployment being rampant and their students therefore being essentially unemployable in the open market. For this reason they are positively disposed towards the notion of sheltered workshops where lies the opportunity for their students to be able to earn a salary.

The following exchange is interesting for two reasons. It first of all highlights the challenges that regular educators would meet if these students were to be included in regular education. Secondly, T20, who at the outset of the interview was opposed to the notion of inclusion because of stigmatisation, is now the one seeing that it is not necessarily cut and dried and that some of their students may well be able to cope in regular education.

R: So, if the, if the move is towards inclusion. Are there students you can think of in your class who you think yes, maybe this student would cope in a regular classroom?

T18: Yes, there are sometimes, and they do get placed out to mainstream.

T22: But it is only a few.

T21: I mean, if you are talking about a totally blind child, how can you?

T20: I would say, for your upper Cerebral Palsied, I think they could cope very well in mainstream.

A further point raised at this interview is the attitude of regular educators who, these teachers feel, do not want anything to do with disabled children. They maintain that the students are better off in an environment where the teachers, who are working with them, have chosen to work with them and want to work with them.

The final point that these teachers made about inclusion is that they believe teaching is relational, and that all children need their teacher to know them well and to understand them. They feel that their children, even those with only a physical disability, perhaps have greater emotional needs than other children. They feel that the children need emotional support to cope with their physical disability as much as they need adaptations to the environment or adaptive equipment. These teachers feel that with the large classes in regular education their students would stand to lose not only the specialised therapy and equipment they currently enjoy, but the emotional support they are afforded at this school because the class numbers are lower and the teachers are motivated to assist these students specifically.

## **School E**

### ***Description***

School E is a rural, low SES, co-educational, special school with boarding facilities for all their students. All students who attend this school are deaf or hearing impaired. The staff is multi-ethnic and all the students are Black. Students range in age from four to 21 and there are about 300 students in the school. In a model similar to School D, this

school has academic classes and what they term *technical classes* where students are taught skills. Within any one class there is up to a four-year age difference amongst the students. They try to balance the social needs of the students with their academic progress.

The school gets government funding and also donations from the public.

### ***School E positives***

These teachers feel that their students benefit enormously from being in an environment where teachers can communicate with them, as all teachers can sign. This, they feel, optimises their students' opportunity for cognitive and academic progress.

They see their classes to be of manageable size and they like their students to be in this safe, nurturing environment where the teachers have chosen to work with disabled children.

The speech-language therapist, who is also an audiologist, provides specialist assistance for all students as far as assessment and hearing aid fitting is concerned. She also works in the grade 0 – 6 classes, sometimes withdrawing students for therapy and sometimes working with the teacher and teacher aide in the classroom incorporating the therapy into the classroom sessions. Always, she follows the themes being studied in the class. Teachers see this as enormously advantageous to their students, and they feel supported by this specialist assistance.

### ***School E challenges***

Teachers note several interlinked challenges. When students come to this school they have no language or very limited language. This has often negatively affected the students' cognitive development. They cannot sign and they have nobody at home who can sign. The challenge for teachers is to teach the children to sign at the same time as teaching concepts that regular children would have developed much earlier.

T26: I think that one of the main problems, is that when the child goes home there in no-one that can sign with them. Also, they come in knowing

nothing. So there is so much to teach them, like boy or girl. What does that mean?

T24: That's why we take them in so young. So that we can build up the sign language before they actually start school.

A further challenge is that the medium of instruction is English and all the students, who have any language at all, have isiZulu as their home language. Unlike School D there is no flexibility here to accommodate the students in this regard. Teachers feel compelled to use English. The following excerpt demonstrates the frustrations teachers encounter when bureaucracy instructs them to do something without consulting them, who are arguably the experts. Interesting, too, is the teachers' feeling of obligation to comply with an edict from "on top".

T23: It's a communication thing. That's why they want to be separate. Our children mostly sign, but some of them can speak.

R: Oh, okay. So when you teach, you talk and you sign?

T23: Yes, that is total communication.

T26: But now they've changed. They have said we must just sign only. We don't have to speak when we are signing.

R: Oh, okay. But for the children who can lipread [*pause*] and speak?

T26: It is unfortunate for them because we don't have to do that. We just sign. That is their culture.

R: And who said that? Was that...

T26: From the top

R: From the top?

This turned out to be the principal enforcing the instruction from the Ministry who had received the instruction from the Deaf Association of South Africa. There has probably been a misunderstanding at ministerial level of the debate being put forward by the deaf community that signing be accepted as a first language. There is no intention on the part of the deaf community to discard oral language where it can be of benefit to people in communication. It is interesting to note the teachers' acceptance and

willingness to comply with a regulation that they know will jeopardise their students' progress. The breakdown in communication even within the school is interesting. The speech-language therapist is still busily testing children and fitting hearing aids on the assumption that whole communication will continue to be used, and she is horrified when I tell her that the new ruling is signing only. It highlights the segregated, compartmented nature of structures that can develop within a school which is founded on a philosophy of segregation. The teachers teach, and the Speech Language Therapist who is also an audiologist, does assessment and hearing-aid fitting, but is not privy to the policy being implemented in the school.

A further challenge these teachers mention is the increased administrative load with the advent of OBE in 1998. They are spending a lot of time making the links between the regular curriculum and the curriculum their students can cope with, and this varies greatly within one class. Now, they have an added administrative burden which diminishes their preparation time and causes what they deem to be unnecessary stress. For them in this special school with their students, they see OBE as an add-on. They feel nothing they were doing can be discarded if they are to meet the needs of the students, but they are compelled to embrace OBE and its concomitant workload.

Again the levels of poverty of the community they serve and the impact of AIDS are mentioned as challenges to them.

### *School E and inclusion*

These teachers feel that if their students were to benefit from inclusion, it would need to be done well. They maintain that if inclusion is to be done well it costs a lot of money — more money than they see the government currently having. They therefore think it best to continue with schools such as theirs and even strengthen them, before there is an attempt to include students with hearing impairment in regular schooling.

Since communication is central to learning they feel their students would be seriously disadvantaged if they were to be placed in regular education with teachers and peers who cannot sign. The chances of the community at large learning to sign, they reckon at nil.

## **School F**

### ***Description***

School F is an urban, middle SES, co-educational special school which caters for students with severe intellectual disabilities. They have boarding facilities for 30 of their 200 students and could easily double that number if they had the facilities to cope. The monthly cost for boarding is R475, which puts it out of reach for many families who live in poverty. The staff is multi-ethnic as are the students.

T30 gives a good overview of the school.

T30 : We're a school for severely mentally handicapped children. Um that is our main criteria. But we also do have children with other slight disabilities um, mainly physical disabilities. We don't really have children with visual or hearing impairment much here. The school is broken up largely into two streams, a junior stream and a senior stream, and then there's further differentiation in those streams. The senior stream has got five classes, and the junior stream four classes. And then our age groups. We start from six and I think we go up to 21 or 22 is our oldest student. When we decide where a child will be placed, we look firstly at their age and their academic abilities from wherever they're coming from, and then we also look at their social awareness and their social skills to find a placement in the school for them. We usually take them for a two-week trial period and then if they are not suitably placed in that specific class, but we do feel that we can accommodate them, we move them on to the next teacher. That is generally how the build-up of the school happens.

There is an average of 18 students in each class. Depending on the needs of the children in each class, there may be a full-time or part-time teacher aide in the class as well as the teacher.

### ***School F positives***

The main positive according to these teachers is the general happy atmosphere at the school, with the students being stimulated and having fun, within firm boundaries to keep them safe.

A further positive for them is the supportive environment and the close camaraderie among the teachers, which they see as linking to the support and love that is given to the children. T28 is also the parent of a disabled child and is thus also noted as P4.

T28/P4: Yes. Here it is just like a home. It is just like a family. A very happy family. We have birthday parties here. We share.

T29: And when one of us is in trouble, everyone runs around you. I am talking from experience. Ja. I mean trouble at home or financial or whatever. Everybody runs around and helps.

T30: I think that starts maybe in the staffroom because we, I mean, someone would come in and people would know that you have had a bad day, and most of the time someone would say, just sit down and I'll get you a cup of tea. And I think we look after each other, and we're quite close as a staff and you know that is just sort of carried over onto the children and it spreads through the school. Um but we do, we are quite physical and demonstrative with our children. A lot of them just run up to you... they get here in the morning and they start hugging. That little boy you saw in the class, T27, she thought he was very well behaved and well mannered! (laughter). Well, he for example, he'll come in in the mornings and start at one side with the teachers and hug, hug, hug, hug. Sort of, they are quite demonstrative.

T32: We laugh a lot as a staff, we really do. We have gales of laughter coming from the staffroom sometimes.

These teachers are enthusiastic, positive about their students, and clearly enjoy their jobs. Their pride in the school, the achievement of their students, and the important role they see themselves fulfilling, is obvious.

### *School F challenges*

Like the teachers in School A , D, and E these teachers note class size and the increasing number of students with multiple disabilities as a challenge.

They also cite the behavioural problems that many of their students have on entry to their school as a challenge, although they have strategies in place to assist with these students' transition to their school. They have them for one or two days a week initially and then build up the number of days the students attend. Mostly the students relax into the routines of the new school and are happy to attend when they see that they are

able to do what everyone in the class can do. The negative connotation school has for many of their new students takes a lot of energy to change, but they usually manage to overcome their prejudice in time.

A further challenge is lack of boarding facilities. These teachers maintain they could easily double the number of boarders who would benefit from attending their school, but the facilities are full. There is currently no intention on the part of the KZN education department to increase the amount of boarding facilities.

### *School F and inclusion*

These teachers are vehemently opposed to the thought of including their students in regular education. They justify this attitude by explaining that their children have come from regular education where they were unsuccessful, ostracised, hounded, belittled, and unable to achieve the learning outcomes in regular education. They feel they spend a lot of time and energy building up their students' embattled self-esteem and they would be loath to see them re-introduced into an environment that is so damaging to them.

T30: I think from our point of view, why most of say that it (inclusion for all) is a bad thing, is because we know that our children cannot think abstractly. And we know that they are here because they didn't cope with abstract reasoning wherever they were placed, and according to our understanding it would be that they would have to be age appropriately placed, in whatever school they are. And when we say that it's not a good thing, I think we are talking from our children's perspective where we do not want our children exposed again to the situation where they are sitting in a grade 10 class and have to count out the counters when they are doing 3+5 sums when everybody else is doing geometry or trigonometry or something like that.

When most of the children get here, they are in a way so damaged because of all the expectations that they couldn't meet that they are totally um crawled into their shell. And once they realise but look these children can do what I can do, or I can do what these children can do, they immediately relax and start responding to that. Um I've just started [pause] there's a new boy who has just started in my class and on the second day his mother said to me it is so nice to wake him up in the morning and he actually wants to go to school, because he wasn't like that. And I think that is why our immediate reaction is no, that it is a bad

thing. Because we are looking from the mentally handicapped perspective.

T31: For some. You see, on paper it's a brilliant system because it incorporates all sorts of socialisation and levelling the playing field and accepting people, but in reality it is not going to work because of the infrastructure. I mean you have got classes with 40 to 60 kids, and how is the teacher going to cope without an assistant? And to plan another programme for an individual child? And be able to plan a suitable programme?

T29: And it's not just in the classroom, it's on the playground as well. It's when everyone else is playing soccer and they don't want to let this child play soccer because he doesn't even know which way to kick the ball.

T27: Because that stigmatisation is very well known. Normal people look down upon other people who have impairment. So I just don't know why they can contemplate inclusion.

These teachers are equally opposed to the model of a satellite unit for children with disabilities as they see this as explicit a form of exclusion as special schools but without all the positives they have at their school. They see any out-of-class tuition for any students as exclusionary. They would rather see the education of the general population using literature as a means, stories about the disabled, to change society's perceptions before there is talk of inclusion. They also suggest that there needs to be sufficient funding and teacher education before attempts are made to include students such as theirs in regular education.

## **School G**

### ***Description***

School G is an urban, middle SES, regular primary school where parents pay varying amounts depending on income so that the school can fund more teachers than are provided by the government. The school has about 30% Black, 30% Indian, 30% Coloured and 10% White students. The school of around 400 students has 15 teachers, eight of whom are funded by the parent donations; the government funds the other teachers. This allows them to have classes of 20 students in the first year of schooling where foundations are laid, and then classes of 30 students for the rest. In addition there is a satellite unit called the *mastery class* which has 15 students aged nine to 14,

including those with severe behavioural problems and severe learning disabilities. In this class, there is mixed ethnicity, mixed abilities, and differing needs. The staff is also multi-ethnic but with a majority of White teachers.

### *School G positives*

The small classes at the foundation level are seen as providing a good platform for the rest of the students' schooling. The teachers find the class sizes manageable and are pleased that there is the mastery class as it means they do not have to cope with students in their classes who have behavioural issues, and those students who are not coping with the academics have a home within the school as well. They find teaching to more homogeneous groups easier and they feel they achieve more with the students who are in their classes.

Teachers at this school have embraced OBE with enthusiasm as it has provided them with the means to implement an anti-bias curriculum. Many of these teachers are eager to implement new strategies that will extinguish the inequities of the past, and put their students on the front foot. Being in Pietermaritzburg, travel to in-service education is not a problem. They combine classes when some staff are on in-service courses and, while these teachers are not confident about the implementation of OBE, they are positive about it, and enthusiastic about the possibilities it provides, the promise it holds.

### *School G challenges*

The problem of the language of instruction mentioned by other schools is a challenge at this school. About three quarters of the students have English as an additional language and this percentage increases every year as the population changes in the suburb the school serves. There has been no in-service training for teachers on how to meet the needs of students who are learning through their second language.

Those teachers who are funded by parents find it stressful each year as they don't know if their jobs will continued the following year. It depends on the number of students and the number of those who can afford to pay the school fees. Exemption

from paying school fees is the norm for low income families. Teachers paid from school funds have no job security and they find this demotivating.

The implementation of OBE, while seen as having enormous possibilities, is challenging because of insufficient training, and increased administration.

The teacher of the mastery class, who preferred an individual interview, sees the current principal's vision for the mastery class as problematic. She likes to adapt the learning outcomes and to be creative in engaging the students in the learning process. She is fluent in English, Afrikaans, and isiZulu, and likes to accommodate the students by explaining a concept to them in their home language if they do not seem able to grasp in through medium of English. As she explains, her ideals run counter to the principal's expectations in several respects, and her frustration is patent.

T34: From June this year everything has changed very rapidly. They have appointed a very traditional White Afrikaans male as principal whose vision is taking us back to the dark ages. Which is very, very scary because as a special class teacher he wants the children to be quiet, sit at their desks, and do worksheets till it's death by a thousand worksheets. And he's not taking kindly to my creative approach to teaching the special class. I teach the special class with very much a hands-on, facilitative approach. Also, this year I'm studying part time to get a diploma in technology teaching and that is also influencing my teaching... and I teach mainly through technology. We make books that they write and we illustrate them using paper engineering from technology. They read them with each other and I'm finding that is working very well, but there is a lot of noise, there is a lot of chaos, cutting up paper, paper on the floor, which we clean up at the end of each session, but he is not taking kindly to this approach at all. And as for the language thing, well, *[pause]* I guess this is an English medium school, but what about the children?

This teacher is one funded from school fees and she feels her job is in jeopardy if she does not follow the principal's instructions, but she is torn because she knows her preferred practice better suits the learning needs of her students.

The principal also chose an individual interview, which took place after the interview with T34, so it was possible to ascertain firsthand what he thinks. These exchanges take place during discussion about the mastery class specifically.

R: Um, is there an openness to accept an adaptation of the curriculum, an adaptation of their learning outcomes? For example if they're not coping say with reading English if this is the medium of instruction, do they say, right, lets try using isiZulu or Afrikaans until later? Or do they perhaps look at life skills? Or how we behave when we go out, or ...?

M1: Fine, unfortunately, I say unfortunately to answer your question, we are an English medium instruction school so all our instruction is in the medium of English, um, so we don't make provision for learners who are Zulu speakers for instance to come into our system and then be taught in the medium of Zulu. I would like to think that the department has a responsibility there and to create schools with special ed in the home language.

This inflexibility about the medium of instruction is found in some schools, but not all. Interesting too, is the principal's assumption that it is up to the department to address the language issue, not individual schools, principals, or teachers.

I wanted to check up on the "death by a thousand worksheets" belief by asking the following question. As can be seen from his response, he takes it from a curriculum angle not a best practice angle, and the opportunity had flown. I was concerned that if I pursued it further, he would gather that the mastery class teacher had had some negative things to say and I did not want to jeopardise her relationship with her principal.

R: Um, has South Africa generally, or your school in particular, perhaps moved away from the notion of trying to keep these children up to speed, by giving them more of the same? In other words if, um, the teaching in a regular classroom is based on quite a lot of reading, a lot of writing, a lot of individual work — but that these children may be kinaesthetic learners, they might be better communicative learners, and that within the mastery class there's, there is more group work, more hands on, more practical? What sort of philosophy would you try [pause] and [pause] engender in your [pause]?

M1: Yes thanks for that. The department is most generally, and I'm talking nationally now, the department is moving towards an integrated system. But I've had the experience of trying to integrate children with specific learning disabilities into the mainstream. Now you have children such as the children that we cater for that have a general education uh need [pause] and [pause] or a general learning need, and those children need to

be excluded from the mainstream. While it is good to have a system where you can have the strong learners coaching the weaker learners and so on, if a child has a specific learning need or difficulty then that can be addressed in mainstream. But the children that are placed in our special education system most certainly have a general educational difficulty and so they are [pause] they are given [pause] not a watered down education but their, their education is geared to their ability.

While this did not answer the question I had intended, it is an interesting commentary on inclusive education, exclusion, and the role as he sees it, of having mixed ability groups – for the able students to coach the weaker ones. It is possible that he made assumptions about my views because of the title of my research project which he was aware of, and therefore deliberately side-stepped discussing his particular philosophy, preferring to answer from a wider perspective.

### *School G and inclusion*

There is general opposition to inclusion. Exclusionary practices are preferred within their own school and also with regard to special schools. It is interesting to note that, at this school, many believe they are practising inclusion by having the mastery class. They think that since the children clearly have special needs, and they attend this regular school, they must therefore be experiencing inclusive education. The teacher of the mastery class believes this is exclusionary and that the students in this class are excluded in the playground where they are ostracised, as well as in the afternoons during sport where they always choose to be in whatever activity she is overseeing, because they feel safe with her. The principal maintains the mastery class students are fully integrated into all aspects of school life and are thus included. This discrepancy of understanding highlights the wide array of perceptions regarding inclusion and what inclusion means in practice. The teachers at this school feel they are better able to meet the educational needs of the rest of the students if those with disabilities are in separate classes or facilities, and also that the needs of those particular students are better met within that framework as well.

## **School H**

### ***Description***

School H is a secondary school in a small town near Pietermaritzburg. It is a middle SES, co-educational, regular school which has 1050 students. A relic from the apartheid era, this is a dual medium school where for almost half the students, all of whom are White, the medium of instruction is Afrikaans. Running parallel is the English medium part which is multi-ethnic with a third of those students being White and two thirds being Black. The teachers are multi-ethnic, the majority being White. They stream the students as teachers find it easier to teach a homogeneous cohort rather than having mixed abilities within one class. This school is able to fund 10 teachers extra to those paid for by government which means that class sizes are around 40 students per class.

### ***School H positives***

The community considers this school to have a good academic record which makes it the school of choice in the area for many parents. Consequently, they are able to select students whom they think of as more likely to succeed academically. They find the students generally co-operative and glad to be students at this particular school.

Teachers are pleased that class sizes are kept to an average of 40 which they find difficult but manageable. They would not like class sizes to increase further.

### ***School H challenges***

Because the numbers in the Afrikaans section are declining, it has become necessary to limit students' subject choice options. Music, Art and Speech and Drama can no longer be offered and teachers see this as limiting the education students receive.

Because there are fewer students in the Afrikaans section, class sizes are never greater than 35 students. Because the allocation of staff is worked on total numbers of students in the school, this means that in the English section class sizes are often up to 45 students which teachers feel is inequitable.

The main challenge, which is vehemently underscored, is the implementation of OBE. Because they consider there to have been insufficient training and support offered in the implementation of OBE, they find extreme differences in standards.

These teachers do not reject OBE because of the additional administrative load, or the necessity of attending many meetings and workshops, or because of the changes it demands. It is a genuine fear that students will not be getting an education that will meet their needs and equip them to meet the demands of a competitive, economic market and workplace.

### *School H and inclusion*

There is little support for the notion of inclusion in School H. They do have one child with physical disabilities, and she is seen within a charity discourse. The upshot is that while they feel very sorry for her and her bleeding foot after dragging it around all day up and down a three-storey building that has no ramps or lifts, there are no accommodations made for her, other than having a classmate carry her bag for her. She is also excused those parts where she has to use a ruler because she can't hold a ruler, having the use of only one hand. They think a scribe would greatly improve her performance, but they see this as inequitable and they make her write her own exams.

The school is getting another student with disabilities the next year, so there will be two disabled students out of 1050, and the reason they accept them at all is because they are White, as explained below:

M2: We have um, ja, you see because we have to take the Whites in our area because we are the only school with their culture and whatever is represented. They have to come to us, so these children both happen to be White and it's not a racial issue. But we won't be able to do the same for the Blacks because we won't have space. I mean we've got 70 on the waiting list for every grade. ...

It is interesting again to see another understanding of the term inclusion. At this school the perception is that students with disabilities will rarely be allowed to attend and that if they do, they have to fit in with what all other children are offered, with no

accommodations made for them. They see adaptations and accommodations as inequitable and unfair.

## **School J**

### *Description*

School J is a rural, low SES, regular, co-educational, primary school. There is one teacher/principal at the school who is Black, serving students from grade 1 to grade 8 who are all Black. As the numbers are now above 45 she is hopeful that another teacher will be appointed as well. The school is a derelict church building that is not in a good condition. There is no road to the school, there is no electricity, and there are no toilets.

### *School J positives*

There is a strong sense of community amongst the students who all live on farms abutting the valley where the school lies nestled on the valley floor. Students can all walk to school, and are not reliant on public transport which would make the school inaccessible to them. Farmers on the adjacent farms often pick up the students who live on their farms and drop them off closer by. The parents are supportive of their children's schooling as they see education as the only way their children will be able to escape the poverty trap which has ensnared them. They are grateful for the school and the opportunity it offers their children. The children in turn are motivated and co-operative.

### *School J challenges*

There are health issues with there being no toilets as T35 explains:

T35: No pit toilets. Nothing. They are relieving themselves in the open space. So now, with the problem is we are still [pause] let's say it is raining today, and we use the same water where the children they are relieved themselves, and that [pause] comes into the water for drinking.

Having no electricity is a further problem. T35 has applied to a company which has promised to provide them with computers when they do get electricity. This is not

imminent. The child with visual impairment would benefit from enlarged print but with no photocopier this is not possible.

With the implementation of OBE, T35 has frequently had to make the journey into Pietermaritzburg to attend meetings and workshops. These travel costs she covers herself as none of the families whose children attend her school are able to afford school fees. All live in poverty. Also, when she is away from school attending these workshops, the children are left without a teacher. For this reason she has applied for another teacher to teach at her school as well and she has supported this application with the increased number of students. She is hopeful that the department will provide her with another teacher but she points out the person they have mentioned to her has matric, but no tertiary or teacher education at all.

Resourcing in general is a problem at this school. There is one transportable blackboard but no easel for it to stand on which makes writing on the board difficult for T35. There are exercise books and pencils provided by the department but extras like coloured pencils, paints, and cardboard are not provided.

### *School J and inclusion*

T35 is positive about the notion of inclusion. Hers is the only school that children in the area can attend, and if they do not come to her school, they will not be afforded any schooling anywhere. She is quite happy to include students with disabilities, as she says during her three-year teaching diploma she learnt about inclusion and felt an immediate resonance with the philosophy.

When children are seven they enter her school. All of them have isiZulu as a home language, and no English at all. As a result she accommodates them by using isiZulu to introduce concepts, and gradually includes more and more English as the medium of instruction during the eight years they spend with her. While she says she knows she is not supposed to, she teaches students to read through medium of isiZulu and then they transfer that knowledge to English as their skill level in English improves.

It is interesting to see the flexibility explained in a matter-of-fact way. She does not feel she is well supported by government departments so she feels free to select how many and which of their instructions she will follow.

She does not think her students have a very good education, but she shrugs and explains that she does the best she can and nobody can do better than that. If she had another teacher, fewer children or a smaller range of ages and stages, and more resources she is sure she could do a better job and that the children would benefit. That is not how it is, however, and she continues to do the best she can with that which is provided for her.

## **School K**

### ***Description***

School K is an urban, high SES, monastic girls', private school that has students from grade 1 to grade 12. The grounds and buildings are neat and appealing, even though some of the buildings date from the early 20<sup>th</sup> century. It is a small church school, which has a boarding facility, but most of the students are day scholars. The school is well resourced and has highly motivated, well qualified teachers who buy into the vision and ethos of the school.

### ***School K positives***

The smallness of the school makes it a nurturing environment where it is possible to meet individual needs of students. The parents and teachers all have a similar worldview and support the religious character of the school, so the values of the school are an echo of what students experience at home. The teachers are happy to be employed at this school and the students are mostly keen to attend. The school has a long and proud history of providing a sound, broad-based education for students with a balance between academic, cultural, and sporting pursuits. The students are multi-ethnic as is the staff, but with the majority of each being White.

### *School K challenges*

Like School B, teachers here are aware that the environment they live in is one where they are, secure, protected, and constantly consorting with like-minded people. This is not the reality their students will face when they leave school. The students are exposed to wider society through sporting and cultural activities, but at times teachers wonder if their students are fully prepared to function in a society very unlike the one they have spent twelve years in.

### *School K and inclusion*

There are many instances of inclusion in this school as they do not turn students away because they have a disability. The principal feels that the relationships established between the staff, and the staff and the students and between the students themselves foster the success of inclusion.

M6: I think the size of our school first of all. It, um [pause] We are small... and the ethos of the school is one where we really try to nurture the individual. And the promise we make to parents of going the extra mile. But in particular, I think it's the quality of the staff. Not only the person who becomes the teacher's aide but, of course, the main educator in the classroom.

At this school the teachers find inclusion works much better for disabled students at primary than at secondary level. Again the principal explains this in terms of the relationships that prevail at certain ages and stages.

M6: I, I think it's very hard at high school level... because at high school level, the students at our school are taught by, you know, a dozen different teachers and there isn't the same continuity and concern you know, that goes with one child through the day. It would be broken up and put across the spectrum of all the subjects, and the range of teachers. And I think, that close bond between teacher and student, is good in the high school, but it's a completely different kind of relationship. And I don't think with the pressure of the final exam as well, that people easily allow for that, sort of interruption and slow progress.

At primary level students with physical and intellectual disabilities are included with equal facility, with the assistance of teacher aides where needed. At secondary level, the inclusion of students with physical disabilities is not considered to be as great a

problem as the inclusion of students with intellectual disabilities. As the intellectual gap widens the inclusion of these students in academic subjects is seen as more challenging.

## Appendix b

# Participant Information Sheet

### Project Title

Inclusion policy to practice: Meeting the educational needs of students with disabilities in KwaZulu-Natal ten years after democracy.

### Invitation to participate in the research interviews

The purpose of the interviews is to gain different people's perceptions and ideas about meeting the educational needs of students with disabilities in KwaZulu-Natal. You are invited to participate in one of the following types of interviews:

#### 1. Focus group interview option

You are invited to be part of a focus group interview where your ideas will be welcomed and where different people's perceptions will generate new ideas. You will be with people who have something in common with you. The purpose of the focus groups is to give you the opportunity to voice your opinion, and to listen to what other participants have to say, which might spark other ideas for you to share with the group.

#### 2. In-depth individual interview option

If the time of a focus group interview does not suit you, and you wish to take part in the research, you are invited to take part in an individual interview instead. In that case you and the researcher will talk together for about an hour on the topic of the research.

### What happens to the things I say?

The information from the focus group interview or the individual interview will be used by the researcher to determine trends, opinions, and views of all participants. This information will be compared, contrasted and reported in such a way that your view is given substance in the light of current research and the literature, whilst preserving your anonymity as far as is possible.

### What is the purpose of the study?

The study is undertaken in completion of a PhD degree by the researcher, Marguerite Maher. The study seeks to establish whether, ten years after democracy in South Africa, the parents of children with special needs, aid agencies, and teachers of the KwaZulu-Natal region consider that education is readily accessible to students with disabilities, and whether their educational needs are being met.

### How is a person chosen to be asked to be part of the study?

Three focus groups will be formed, and you will fit in one of the following:

- you will be a parent of a child with a disability/disabilities OR
- you will be a member of one of the aid agencies that assists people with disabilities OR
- you will be a teacher of a student with disabilities, or be involved with school management or governance and be interested in special education.

### Can I join the study?

You can join the study if you fit into one of the three groups mentioned above.

### What happens in the study?

We will organise a time and place that is convenient for all participants to meet. The researcher, Marguerite Maher, will be the facilitator of the interview. The interview will take a maximum of two hours of your time.

### What are the discomforts and risks?

It may be that when people are discussing their children with disabilities they may become upset because it is an emotional issue for them. There will be a supportive environment during the interview. You are also able to withdraw at any time during the interview if you wish. The interview will be videotaped or audiotaped, depending on your preference, and it may take a little time to get used to having the video camera/tape recorder there.

### What are the benefits?

Data will be collated and presented in a way that may affect policy formation which will be of benefit to children with disabilities.

**How is my privacy protected?**

If you sign that you would like to be videotaped then your name will be edited out, but your privacy will not be protected because people might be able to view you speaking, as this may form part of the report on the research, and you may be recognised.

If you elect to be part of an interview that is audiotaped only, then your privacy is ensured because you will be allocated a pseudonym in the transcription of the interviews.

You will be afforded the opportunity to read the transcription of the interviews once that has been completed.

You then have the opportunity to withdraw any data you no longer wish recorded. This withdrawal of data must occur within two weeks of the transcription being made available to you.

**Costs of Participating**

There is not cost to you, other than getting yourself to and from the interview itself.

**Opportunity to consider invitation**

You may take this form with you and contact me on 072 446 2538 to let me know if you would like to commit to participating.

**Participant Concerns:**

Any concerns regarding the nature of this project should be notified in the first instance to the Project Supervisor whose name and contact details are on the consent form you will sign. Concerns regarding the conduct of the research should be notified to the Executive Secretary, AUTEK, Madeline Banda, [madeline.banda@aut.ac.nz](mailto:madeline.banda@aut.ac.nz) , +64 9 917 9999 ext 8044.

There is also a local contact person you could approach if there are any concerns regarding the nature of the project. This contact is: Head of the School of Education, University of Natal, Professor Michael Thurlow, [thurlow@iafrica.com](mailto:thurlow@iafrica.com) 031 260 2634

**Approved by the Auckland University of Technology Ethics Committee on 15 August 2003**  
**AUTEK Reference number 03/90**

## Appendix c

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### MEMORANDUM



#### Student Services Group – Academic Services

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To: Colin Gibbs  
From: **Madeline Banda**  
Date: 18 November 2003  
Subject: 03/90 Inclusion from policy to practice: Meeting the educational needs of students with disabilities in KwaZulu-Natal ten years after democracy

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Dear Colin

Your application for ethics approval was considered by AUTEK at their meeting on 10/11/03.

Your application was approved for a period of two years until 10/11/05.

You are required to submit the following to AUTEK:

- A brief annual progress report indicating compliance with the ethical approval given.
- A brief statement on the status of the project at the end of the period of approval or on completion of the project, whichever comes sooner.
- A request for renewal of approval if the project has not been completed by the end of the period of approval.

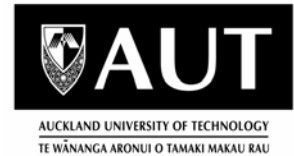
Please note that the Committee grants ethical approval only. If management approval from an institution/organisation is required, it is your responsibility to obtain this.

The Committee wishes you well with your research.

Please include the application number and study title in all correspondence and telephone queries.

Yours sincerely

Madeline Banda  
**Executive Secretary**  
**AUTEK**  
Cc: Margie Maher



## Consent to Participate in Research

Title of Project:

**Inclusion policy to practice: Meeting the educational needs of students with disabilities in KwaZulu-Natal, South Africa, ten years after democracy.**

Project Supervisor: **Professor Colin Gibbs**

Researcher: **Marguerite Maher**

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- I have read and understood the information provided about this research project.
- I have had an opportunity to ask questions and to have them answered.
- I understand that the interview will be videotaped and retained to show as part of the report / audio-taped and transcribed. **(delete which is not applicable)**
- I understand that I may withdraw myself or any information that I have provided for this project at any time prior to completion of data collection, without being disadvantaged in any way. If I withdraw, I understand that all relevant tapes and transcripts, or parts thereof, will be destroyed.
- I understand that I will have an opportunity to view transcriptions of the interviews and (within two weeks of having access to the transcriptions) withdraw any data I no longer wish to have recorded.
- I agree to take part in this research.

Participant signature: .....

Participant name:

Date:

Project Supervisor Contact Details: Professor Colin Gibbs  
School of Education Te Kura Matauranga  
Auckland University of Technology  
Private Bag 92006  
Auckland  
New Zealand

Phone: +64 -9- 917 9999 X7227

**Approved by the Auckland University of Technology Ethics Committee on 15 August 2003**  
**AUTEC Reference number 03/90**

# Consent for a Child to Participate in Research

Title of Project:

**Inclusion policy to practice: Meeting the educational needs of students with disabilities in KwaZulu-Natal, South Africa, ten years after democracy.**

Project Supervisor: **Professor Colin Gibbs**

Researcher: **Marguerite Maher**

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I, (print parent's name) ..... hereby give permission for my child  
(print child's name) ..... to take part in the interview on children with  
disabilities. I agree that my child may be part of an interview with other children and with the researcher,  
Marguerite Maher. I give permission for her/him to be audiotaped/videotaped (**delete one**) for the purposes  
of the research about which I have full knowledge. I give permission for the information s/he may provide to  
be used in the abovementioned research.

Parent's signature ..... Date .....

# Consent to Participate in Research

Title of Project: Inclusion policy to practice: Meeting the educational needs of students with disabilities in KwaZulu-Natal, South Africa, ten years after democracy.

Project Supervisor: **Professor Colin Gibbs**

Researcher: **Marguerite Maher**

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- I have read and understood the information provided about this research project.
- I have had an opportunity to ask questions and to have them answered.
- I understand that the interview will be videotaped and retained to show as part of the report / audio-taped and transcribed. **(delete which is not applicable)**
- I understand that I may withdraw myself or any information that I have provided for this project at any time prior to completion of data collection, without being disadvantaged in any way. If I withdraw, I understand that all relevant tapes and transcripts, or parts thereof, will be destroyed.
- I understand that I will have an opportunity to view transcriptions of the interviews and (within two weeks of having access to the transcriptions) withdraw any data my parents or I no longer wish to have recorded.
- I agree to take part in this research.

Participant signature: .....

Participant name:

Age:

Date:

Project Supervisor Contact Details: Professor Colin Gibbs  
School of Education Te Kura Matauranga  
Auckland University of Technology  
Private Bag 92006  
Auckland  
New Zealand

Phone: +64 -9- 917 9999 X7227

**Approved by the Auckland University of Technology Ethics Committee on 15 August 2003**  
**AUTEC Reference number 03/90**

## **Appendix e Transcript of an interview and coding exemplar on an extract**

This appendix includes the transcript of a full interview showing researcher interaction with a participant and then an exemplar of coding from NVivo on a section of that interview. Finally, the memos included during the coding stage are provided. These are indicated and numbered within the text of the transcript.

### **Interview 12**

(Greeting and Intro)

R

Tell me about your school, yourself, your class, and how you find it.

T34

I am fairly new at special education. I came, I joined special education at the beginning of last year, I had been retrenched from my position and I was doing a locum job at this school and so I became involved in special ed. The school at which I am is an urban school. It was formerly a predominately white school but with democracy in SA and multi-cultural education coming into being, the school has slowly changed from being a predominately white school from an affluent from an affluent area to a school where the ratio of children is 30% African children, 30% Indian children, 30% Coloured children and approximately 10% White children. So the class is very much a multi-cultural school but we no longer draw from privileged white families. We also draw from quite a poor area so we have great difficulty with funding etc, like that.

R

When you say you have problems with funding, you get government funding for teachers' salaries do you?

T34

We get government funding for a limited number of teachers' salaries

R

I see.

T34

It comes to an amount of R34000.00 out of a total budget of 2 million rand. So it is a very small amount and this has put enormous pressure on the financial resources of the school and the best way to use them.

R

So are some of the staff here paid from school funds or something like that?

T34

Yes. It is because of this funding that most of the classes range between 20 and 30 children per class. [Pause] The educational ethos in the school has also changed lately, we had a very creative headmaster who resigned to go and work overseas. Then we had the DP stepping in to act as principal. She's like the previous principal, also had a broad vision of education was very supportive of the teachers. She had a vision she was open minded about the new ed policy of bringing in OBE and inclusion etc. From June this year everything has changed very rapidly. They have appointed a very traditional White Afrikaans male as principal whose vision is taking us back to the dark ages. Which is very, very scary because as a special class teacher he wants the children to be quiet sit at their desks and do work sheets. 'Till it's death by a 1000 work sheets and he's not taking kindly to my creative approach to teaching the special class **Databite(1)**. My, the way I teach the special class has been strongly influenced from my pre-primary experience where it's very much hands on facilitative approach. Also this year I'm studying part time to get a diploma in technology teaching and that has also influenced my teaching and I teach mainly thru technology. We make books that they write and we illustrate them using paper engineering from technology. They read them with each other and I'm finding that is working very well. But there is a lot of noise, there is a lot of chaos, cutting up paper, paper on the floor, which we clean up at the end of each session, but he is not taking kindly to this approach at all. [Pause] In the special class I have approximately 14 learners at the moment. Ranging from nine years old to 14 years old. It's a mixed cultural group, mixed age group. mixed as far as abilities, problems etc. are concerned. I get learners into the class throughout the year. The procedure is that learners come for a minimum of 2 weeks. I find that I need a month to see if they fit into the class or not. Then we see if they fit in or whether they should go elsewhere **Databite (2)**. So far this procedure has worked quite well. The child arrives in the class with no background information at all so I don't know what the problems are and have to try and find out through working one-to-one with them.

R

Is that deliberate or is it just that there is a breakdown in communication?

T34

No that is deliberate because they don't want us to be prejudiced.

R

Have preconceived ideas?

T34

Yes. This has worked very well generally but at the beginning of the year we had a real problem case. We are still not sure what the problem was but this child who came into the class for a month's trial, totally disrupted the class. To the extent that the parents complained that she was getting preference in terms of the others. She'd have temper tantrums, she was running out the classroom, crawling out the windows, ..It was an absolute nightmare and I was ready to resign.

R

Do you have any adult assistance in your class?

T34

I have no adult assistance and I get very little assistance from the psychological guidance service. Not because they don't want to help us but they are so stretched meeting the needs of children with disabilities in the rural areas **Databite(3)**. Which, up to now have had no or very little support. So far we have had one days workshop with integration of all the different children and how to cope with them in the special class. As far as support from the principal and staff are concerned. I get very little support from the staff. They all say "no thanks, you are welcome to those children we don't want anything to do with them". There is very little, if any, money going towards the school. Most of the books that they read in this class I have bought, the games I have brought are one's that parents have donated or that my own children have outgrown. Um Financially I have never had any money to spend on the class. So although you try to help these children there is very little teaching material or very little that is done by the school to help them. [Pause]

The other children also have a strange attitude to the children. There are very few who accept them. They tend to tease them a lot and laugh at them. So when it is time for integration such as play time [pause] on the playground the children in the special class tend to stick together. I also find in the afternoons when extra-mural activities are offered they usually tend to follow me because they know they are safe and secure. So although it is not forced exclusion it happens **Databite(4)**.

R

Do you think that those attitudes of the other children, towards the children in this class, are fostered by their parents or by the teachers who teach them? Or is it just society who thinks that those people need to be laughed at and shunned. and pushed aside and teased.

T34

I think it's mainly the parents' attitude and this attitude of society. Because I know that the vice-principal encourages the old learners who are their prefects to treat them kindly. When it is the end of year function to ask them to dance etc. And it's quite a major learning um or learning emphasis with the grade 7s before they take on being prefects in this class. [Pause] Before I became involved in this job I was working on a project in the rural schools for two years observing junior primary school teachers and seeing how the teachers coped with the problems of getting the children to read and write. Especially in a second language and that certainly opened my eyes a great deal as to the problems of the children in my class. I'm sure a lot of these children are here because they are learning in a second language . They are also here because none of the teachers so far. We're 10 years into democracy have had any training or guidance from the ed dept on how to deal with 2nd language learners (- see page 6 of this link). For example there are words in Zulu or sounds in English should I say which don't exist in Zulu , which is in Kwa-Zulu Natal is the language of the majority of the learners. So that when they're learning English spelling or learning phonics they cannot actually identify the sound that the teachers are trying to teach them because it doesn't exist. For example, if you take the word 'bed', you have a bed to sleep on and you have a bird that flies in the air. If you say to a Zulu child 'the bird flew over the bed'. The Zulu child would hear it as, 'the bed flew over the bed' and they would not be able to distinguish these two sounds and this causes a lot of the learning problems.

R

It's those vowels, hey?

T34

Yes. Also a lot of the materials available has been very much English based, from Britain all about the snow etc. which most of our children can not identify with. So that has also impacted on their ability to learn. Another problem which we have is the cultural beliefs of a lot of the African people. For example, I had a child in my class last year who I knew was deaf, was hearing impaired. She needed to be tested and see if she needed a hearing aid. Money was not a problem. She comes from a very affluent family but culturally it is not acceptable for Zulu people to wear a hearing aid. So, although they had her tested and she needed a hearing aid, the parents will not provide her with a hearing aid because of the cultural taboo. [Pause] Earlier this year I had some students in my classroom from the university. They were doing their 4th year teacher training course, it was the diploma in education and one of the ladies was a mature woman, she had her own children, she was an African lady, a delightful person. I was asking her about these cultural beliefs and she said "Yes that's quite right because if you pray enough to the ancestors they will fix this problem that is preventing this child from learning" **Databite(5)**. So although she had been through university these cultural prejudices had not changed. She said she herself had visual problems as a child and the family all prayed to the ancestors and now she does not need glasses. And I found that quite an enlightening and horrific experience. [Pause] The children in my class come from a very mixed background as far as um financial provision is concerned. I have some children in my class who are incredibly poor. Their parents might be doing part time jobs and they might just have bread and tea to eat. So as a result we have started feeding them and that has helped. On the other hand we have quite wealthy parents who are Muslims but because of the intermarriage a lot of the children have got learning disabilities which is also quite frightening. Because one would think that although these parents come from educated backgrounds they would know about intermarrying and genetic um weaknesses that would come through. One girl in particular, she comes from a family of 5 children, she is in a special class. Her younger sibling is a Downs child and this is from the intermarriage of cousins. A lot of the children are here because their parents are not particularly bright and so they have inherited low intelligence. Um, other children are here because of emotional and social problems at home, abuse at home or marriage breakdowns. [Pause] and I have seen a huge improvement in the 2 years I've been here because I allow them a lot of freedom to say what they feel even if at times they get very angry with me. I believe this anger needs to come out and that will be one less hurdle in helping them learn and get on with life. [Pause] Are there any other questions you want to ask?

R

Um, yes. If you just think in terms of um perhaps other schools that you know of or have heard of or have seen or even when you were around in the rural areas and helping in the pre-school area, um, what provisions do you think are best within the, the political constraints, the financial constraints currently in South Africa? How best can we meet the needs of children who have some or other impairment? I'm thinking of those children who have physical impairment maybe children with spina bifida or

those who have, um, cerebral palsy but who have, um, they are fine intellectually but because of their physical disabilities find it very difficult to find places in schools. Did you come across any little ones when you were out in pre-schools?

T34

Not very many because there were special schools for these children i.e. St C

R

Now does St C go from pre-primary up?

T34

Yes.

R

And they are physically disabled?

T34

Yes

R

Including visually impaired and hearing impaired or ?

T34

Yes they are mainly the children who are, who have major problems but with the input of speech therapists, occupational therapists, physiotherapist, they do have a better chance of um developing their minds. Where here at this school, there is no support system as far as speech therapists occupational therapists etc are concerned.

R

Not even psych services even?

T34

No, because their services are so stretched.

R

There are just too many really for the number of people?

T34

Yes. We need to work more closely with the hospital across the road. To use their speech therapist, physiotherapist etc. As yet we haven't used them. I've tried to get, I've a set of twins in the class who, because of twins, and because of , um, the age of the mother, they have quite severe problems. They were both at St C. They still need speech therapy they need glasses. The family is quite poor and the parents cannot organise for them to go to Grey's Hospital. It's also quite a busy road so they can't cross it and as yet I don't have the time to take them across in the afternoons for their therapy. But I'm hoping that we can look at that during the new year.

R

It is sort of a support thing, hey? I mean, you work here, you've got 14 children, you've got them from 8 to 2 p.m. or whatever the time is. You actually don't have time to also take them for speech therapy and other therapy

T34

Yes. If they could relieve me of some of my afternoon duties such as teaching sport until 4 p.m. at which I'm hopeless at that in any case. Leave me rather to take the children one afternoon to therapy.

R

Ja, that would be so much better wouldn't it?

T34

Yes it would

R

So you see those sorts of things are doable aren't they?

T34

Yes, but also if you look at all the schools that have special classes for disabilities. Most of the schools have the most unbelievable amount of stairs so that is something we need - the money to change the physical facilities of the schools so that children in wheelchairs can be integrated.

R

But if you think of the attitude of the principal here towards the children who have disabilities, it is almost as though, if I interpreted it correctly, that he perceives it more as a behavioural problem. If they would just get on and do their worksheets then they would learn. Instead of honouring the fact that these children have a disability and need perhaps a different approach.

T34

Yes, definitely.

R

So if we were to target principals regarding inclusion and children with disabilities and providing for them.

T34

It would be a very intensive long term target because not only are the [pause] attitudes pretty narrow for the disabled children or children with disabilities but also there whole attitude about how children learn. That learning is from worksheets not that you learn while you are having fun. They are very traditional in their approach. They are pretty reluctant, especially the White principals who have a far more closed mind to outcomes based education than the Indian, Coloured or African schools which have known they have to change the way they teach.

R

Because it wasn't working?

T34

Because it wasn't working. While the White principals think their schools are working. We actually don't need OBE, what we're doing is fine. But what they are doing is actually the behaviourist approach, which went out 30 or 40 years ago. And although they are trying to change the attitude of teachers to accept different ways of teaching, A recent survey [pause] a friend of mine who is a subject advisor who is running these courses had a person from US aide who is observing to see how transformation is taking place. And his comment was 'it's the white schools who are in the dark ages' Not the black coloured or Indian schools because they have never tried OBE.

R

Very interesting, and what about teacher training? What could be put into teacher training to make to make general teachers more open to assisting?

T34

At the moment at the universities' teacher training is going through a very dicey phase. I was a lecturer at the university, doing the junior primary teaching. My predecessor was a totally traditional lecturer. I had great difficulty breaking down the barriers with the 3rd and 2nd year students. The 1st year students loved the way I approached junior primary school teaching. Hands on, child centred, but it was very difficult to break through to the 2nd and 3rd year um teachers. [Pause]. At the moment with the emergence of all the universities and the transformation I don't think they've got the right staff in place yet. There are a lot of admin problems and I think it will be a long, long time before you get really good people in the lecturing posts who have a broad vision of education. Who will produce, ah, good teachers [pause] because at the moment the emphasis is very much on whose job can we secure in the mergers?

R

They are not feeling safe, they're not really in a safe place?

T34

And not at the institutions either. For example, the first year I was there when they were organising the 1st year course, it was a case of right, all come to the staff room. Right, who has got any course that we can put together that we can offer the 1st years next year? And it was a mish mash of absolute nonsense. Africa In The World, something else, something else. What do 1st year teachers need to know before they go out for their prac teaching in the schools? So it has been a very unhappy setup because the schools have been fed up that the 1st year teachers come in, they are expected to teach yet they have no tools with which to teach. [Pause]. So we have a long way to go. ...

R

And your dream, what would your dream be? In an ideal world what would you want for these children.

T34

[Pause] I would love to see more open schools where you have facilities in the schools where children can go for extra support. For example, in my class I cannot meet the

needs of every single child because the group is so diverse in age and ability. But if I could send them to a speech therapist nearby, just to get the backup in the areas where I can't cope. I would also like a very different staff from what I'm with now. A much more, I would like a staff who has never stopped growing in their professional fields. Most of these teachers stopped the year or the 2nd year after training college. Um, I would like a much more supportive principal who also has an open vision **Databite(6)**.

R

An understanding of the children and their needs?

T34

Yes, because I know the parents have been very thrilled with what I have done with their learners. I spoke to two of them the other day and they said they have never had children who have learnt so much and grown so much and loved it.

R

It struck me what fun everybody has.

T34

We have lots of fun in my classroom. There is always chaos which upsets the principal. But we sort out the chaos at the end of that activity. We do lots of hands on things we have a very flexible curriculum. And the parents have certainly picked it up.

R

And the children are growing and learning. That is what it needs to be, adaptation of the curriculum, adaptation of the environment.

T34

And I must say I never thought when I arrived here as a locum. I was counting the days until my locum ended after two weeks. And it kept being extended and extended. And now I just love this job. *[Pause]* but also studying technology has helped me adapt enormously. You know when we are doing the phonics sounds, we make animals. We make real (indistinct) and we spin the ears and E for elephant and all the E words and we spin in the ears and things like that. And they've learnt skills cutting out the elephant putting it together and they've just loved the elephants. So it's all that. You have to be very creative and adaptable.

R

Have you got enough of paper pens glue that type of thing?

T34

No. So many of my children come from poor homes, they lose everything. I provide a lot of the stuff (laughter).

R

Thanks so much, thank you for your time. (Salutation).

## Screen dump showing coding from a section of this interview

So are some of the staff here paid from school funds or something like that?

**T34**

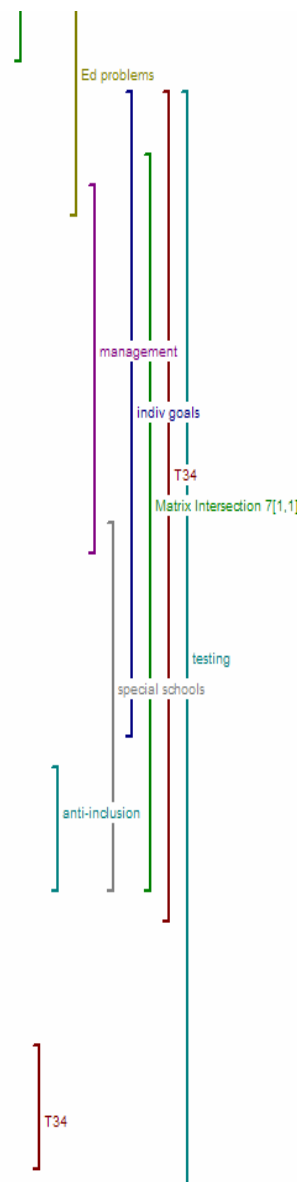
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**T34**

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R  
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T34

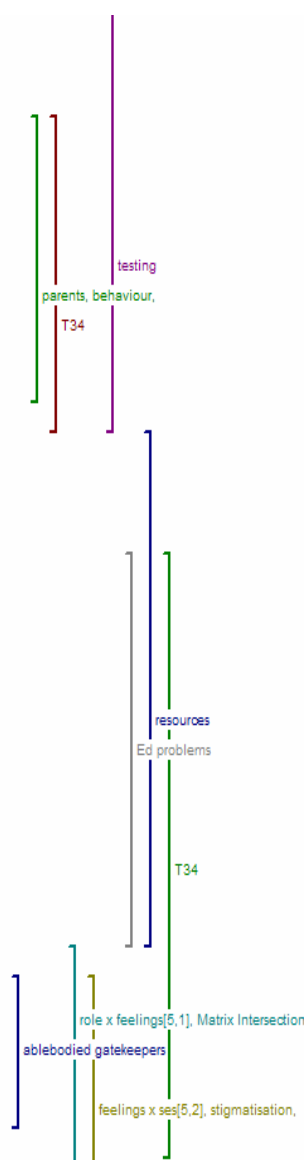
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R  
Do you have any adult assistance in your class?

T34

I have no adult assistance and I get very little assistance from the psychological guidance service. Not because they don't want to help us but they are so stretched meeting the needs of children with disabilities in the rural areas (3). Which, up to now have had no or very little support. So far we have had one days workshop with integration of all the different children and how to cope with them in the special class. As far as support from the principal and staff are concerned. I get very little support from the staff. They all say "no thanks, you are welcome to those children we don't want anything to do with them". There is very little, if any, money going towards the school. Most of the books that they read in this class I have bought, the games I have brought are one's that parents have donated or that my own children have outgrown. Um Financially I have never had any money to spend on the class. So although you try to help these children there is very little teaching material or very little that is done by the school to help them. [Pause]

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## Copy of Memos written during coding and analysis from this section of the transcript

(1) This reinforces two things -

(a) the fact that it is vital that any in-service education that goes on with regard to inclusion, includes the principal and other admin decision-makers

(b) any programme for children with disabilities in a satellite unit is only as good as the teacher(s) involved and the support they are given to make the necessary accommodations and adaptations

(2) Still here with someone who clearly has a heart for chn with disabilities is the notion that she can only meet certain needs. The idea that the school should adapt to meet the needs of the child is slow to become a reality. Is this perhaps because of the legacy of apartheid and the entrenched assumptions that it is a good idea to segment people into like groups and keep them that way? I don't want to be critical of her at all. She is doing a marvellous job. When I was there for their "party" the evidence of the children's excitement about their project, their engagement, their implementation

of skills they had been working on, was wonderful to see. I just wonder why children have to meet some sort of criteria to be allowed to work in this obviously positive and supportive environment.

And as for starting to re-invent the wheel as a child is transitioned into her class. Well, why would you? Again perhaps her unspoken assumption is that 'regular' class teachers will focus too much on the child's shortcomings and what they can't do, rather than on their strengths; and perhaps she doesn't want to be negatively influenced or disposed towards a child. But if one considers particularly the behavioural issues, surely it is vital that strategies that work be imparted to her, or triggers to be avoided?

(3) This marries up with Nithi's comments about the lack of skilled people, or even people willing to undertake jobs in this area of education.

(4) I am not sure here whether the non-acceptance by the other staff members and the lack of support from the principal is perhaps filtering down to the students who then feel they can ostracise these special class children. Or is it a case of, when you have any form of exclusion, withdrawal time, etc, the differences become highlighted and with it the feeling of superiority / inferiority - them and us - that promotes discrimination? Slee would say that. Nevertheless, at least these children are happy whilst in class and are learning, so there are definite positives as well.