CHAPTER 1
Introduction and Orientation

Throughout history,
people with physical and mental disabilities
have been abandoned at birth,
banished from society,
used as court Jesters,
drowned and burned during the Inquisition,
gassed in Nazi Germany,
and still continue to be segregated, institutionalised,
tortured in the name of behaviour management,
abused, raped, euthanized, and murdered.
Now for the first time people with disabilities are taking their rightful
place as fully contributing citizens. The danger is that we will respond
*with remediation and benevolence rather than equity and respect. ***

1.1   INTRODUCTION TO THE STUDY

The puzzle that is interrogated in this thesis is how principals of independent schools in South Africa understand inclusive education, and what the implications of this understanding has for the practice of inclusive education. As a researcher in this chosen field of study, I am particularly interested in instances where children who are normally marginalised in society because of disabilities, are welcomed and included by principals into their contextualised settings. I wish to understand why principals would be open to including children with disabilities into their schools and how their presence affects the practice of inclusive education. The reasons for inclusive education and the philosophy behind this practice is what intrigues me and the quest to understand this phenomenon is the driving force behind this study.

This first chapter begins with an introduction to the research problem and the problem statement. An examination of the general area under study, the problem statement, the specific area I will be studying, and the purpose of the study follows. Several pertinent questions relating to the study are then investigated to set the scene of the study and I then give reasons for how I came to do this study. The chapter ends with a purpose statement, the research questions and a conclusion.

* Quote sourced from http://www.normemma.com/advocacy/artcreal.htm

1.2   INTRODUCTION TO THE RESEARCH PROBLEM AND PURPOSE

The response to inclusive education is seldom neutral. It has been successfully implemented in some settings while in others it has been misunderstood, met with inertia or simply overlooked. The question that needs to be asked therefore is whether inclusive education is actually a viable option for schools, and in particular, whether it is an option for schools in a developing country. Is it a cause worth pursuing, or is it just the vision of a few well-intentioned individuals?

Historically, the evolutionary process that preceded and shaped the move towards a more inclusive society worldwide was originally influenced by "the slow historical march to improvements in rights, fraternity and equality" (Roaf & Bines, 2004) for all citizens – such as the struggle for freedom from slavery, the suffragette movement that led to women having the vote (Baynton, 2001), and the civil rights movement in the early 1960s. More recently, and in addition to the aforementioned political movements that initiated 'improvements' in society for slaves, for a variety of race groups, and for women, several high-level transnational initiatives have significantly contributed to improving the plight of millions of people, especially children, who for centuries have endured enforced exclusions within their own communities. It is therefore indeed puzzling that the so-called modern world continues to exclude certain groups of people from full inclusion in society, and particularly from schools within its own enclaves. This is no more clearly illustrated than the current number of children who experience exclusion of one type or another and which includes over 113 million children worldwide who do not have access to education *at all* (UNESCO, 2003). The vast majority (71%) of these vulnerable children live in Africa (ibid). The reasons for the exclusion of children from school may be varied and understandable considering their contexts, but they are seldom valid.

Recent efforts that have taken place in creating a more equitable education system as a result of the concerted efforts of transnational organisations and initiatives are as follows: The *first* initiative that paved the way for a more inclusive education system took place three decades ago in Latin America when the Mexico Declaration was promulgated. This declaration set forth three main goals that were intended to improve the existing monolithic, and exclusive, education system, namely: universal access to primary education;

the eradication of adult illiteracy; and the overall improvement of the quality and efficiency of education (UNESCO, 2006). The realisation of these goals was set for the year 2000. The *second* initiative to improve the delivery of education to all children was the World Conference on Education for All (EFA) which took place in Jomtien in 1990. At this conference, the Mexico Declaration was expanded to include six further goals which focused on the effective provision of EFA to all children who were not already in an educational setting. In addition and, for the first time, the category of children with disabilities was specifically mentioned and there was widespread agreement that they, along with the poor and disadvantaged, should be provided with essential ECD services. A *third* important initiative was the Salamanca World Conference on Special Needs Education in 1994 which specifically highlighted the exclusion of children with disabilities from the existing schooling system. In order to address and counteract the exclusionary practices experienced by these children, the Conference adopted the Salamanca Statement which introduced new principles, policies and practices for educating children with disabilities and related difficulties. In addition, the Conference adopted a framework of action that would set the goals and pave the way for changes in education, changes that would ensure that children be less excluded by separate and unequal schooling and more included into 'schools for all' in mainstream education. Mittler (2000) states that Salamanca was significant for a variety of reasons including a reminder to governments that children with disabilities must "be included within EFA" (p. 17) and that there should be an "exchange of ideas and experiences" (ibid) on how this could be achieved. In addition, Mittler explains that children with disabilities are part of a much larger grouping "of the world's children who were being denied their right to education" (ibid) including street children, "children who are the victims of war, disease and abuse, children from remote and nomadic communities, other disadvantaged and marginalised groups and disabled and gifted children" (ibid).

The Salamanca Statement highlights that governments need to have the political will to work towards achieving inclusive education in collaboration with others. It is also envisaged that 'schools for all' would create spaces that would not only include every child, but would support all types of learning, would be responsive to the individual needs of all children and would be recognised by the diversity of its students. In addition, it was believed that 'schools for all' would make an important contribution to the agenda for achieving EFA, another important initiative in trying to make schools educationally more effective and accessible to

all children (UNESCO, 2000). A *fourth* initiative in the quest for more effective schooling was the Dakar World Education Forum held in April 2000 which not only affirmed the urgency of addressing exclusionary practices but also reaffirmed a commitment to achieving a more equitable EFA by 2015.

According to Mittler (2000), there were several other initiatives that focused on the rights of people with disabilities including, amongst others, the Standard Rules on the Equalisation of Opportunities for Disabled Persons (UN 1993). These rules consisted of 22 standard rules covering a "wide range of needs including education, accessibility, employment, income maintenance and social security, family life, personal integrity, culture, recreation, sports and religion. Some rules are concerned with preconditions for equal participation and others with monitoring and implementation" (ibid, p. 18-19). This initiative was overseen by a high-profile former Swedish Minister for Health and Social Affairs Mr Bengt Lindqvist who is himself blind and who was a strong advocate for individuals with disabilities (Mittler, 2000). He later became Special Rapporteur of the UN Commission for Social Development. The World Summit of Social Development which took place in Copenhagen in 1995 was another initiative that "made a triple commitment to the eradication of poverty, unemployment and marginalisation" (ibid, p. 19) and since they were lobbied by people with disabilities who wanted to be strongly represented in this initiative, the final report included a resolution to "ensure equal opportunities at all levels for children, youth and adults with disabilities in integrated settings, taking full account of individual differences and situations" (ibid, p. 19). Other initiatives that have been influential at government level regarding disability and equality are UNESCO, the UN Convention on the Rights of the Child, and the Organisation for Economic Cooperation and Development (OECD) which focus on lessons learnt from inclusive practices in eight first world countries (Mittler, 2000). There have also been European initiatives that track developments concerning inclusive education such as HELIOS (Handicapped Europeans Living in an Open Society) and SOCRATES which encourages cooperation in the field of education (ibid).

The cumulative outcome of these transnational and international initiatives is a much greater awareness of disability issues as well as the adoption of principles of inclusive education as a way of counteracting the pervasive exclusionary practices of mainstream schooling (see Appendix A for the definition of inclusive education that arose out of the

Salamanca and Dakar Conferences). As a result of these initiatives, many countries, including South Africa, felt compelled to adopt the notion of a more inclusive system for themselves. A local framework of action was therefore tentatively promulgated in *Education White Paper 6 on Special Needs Education: Building an inclusive education and training system* (also known as WP6 or sometimes EWP6) which was published in 2001. The overall intention of this framework of action was to introduce and facilitate the adoption of a more inclusive system into the existing educational system. Similar to the goals of the Salamanca and Dakar Forums, the implementation plan of WP6 is long term, and in this case, 20 years (from 2004 – 2024). WP6 is thus a reflection of, and a response to, the global trend of a changing education system that reflects the inclusivity of a more diverse population of students, particularly children with disabilities or 'special needs'. WP6 has set the scene therefore, for the implementation of inclusive education in South Africa. The problem is that the response to, and the understanding of the well-intentioned document has been mixed and sometimes notable by its absence.

1.3 GENERAL AREA UNDER STUDY

Where inclusive education *is* evident in schools is what interests me. I will therefore be searching out schools practicing pragmatic forms of inclusive education, that is, schools that purposely include children with disabilities into their contexts, and interviewing the principals of these schools in order to interrogate how they understand inclusive education. I also wish to examine how the understanding of inclusive education affects the practice of inclusive education. I make the assumption that the principals have been instrumental in introducing the inclusionary processes into their schools. In their model for building a "health-promoting" (Engelbrecht, Green, Naicker & Engelbrecht, 1999, p. 62) inclusive school, Davidoff and Lazarus (1997) (as cited in Engelbrecht, Green, Naicker & Engelbrecht, 1999), believe that the leadership of a school is paramount for developing policies, aims and strategies; for creating an inclusive school culture; for providing support; and for identifying external factors that may hinder the development of an inclusive school (ibid). My assumption that principals are responsible for developing inclusive schools is therefore supported in the literature.

1.4   PROBLEM STATEMENT

The puzzle that was the driving force behind this study is the quest to find out how principals in South African schools understand inclusive education and how their understanding affects the practice of inclusive education. The study will be shaped by the knowledge gained from the literature review, from the data derived from principals, from field notes and from observations. Introducing inclusive education into South African schools has been a national priority of the Department of Education since the beginning of the millennium (Department of Education, 2001). To change a system to one that reflects more equitable outcomes for children requires having key people, and especially principals in place to manage the paradigm shift that is necessary to transform a school into being inclusive. Shields, Bishop and Mazawi (2005) justify this point when they explain that,

> "[t]ransformative (rather than transformational) leadership focuses on social justice, on redressing wrongs, and on ways to intervene in educational processes to ensure that equitable outcomes are accompanied by more equitable use of power and widespread empowerment. Transformative leadership challenges deficit thinking as well as attitudes, policies, and practices that pathologize *[sic]* the lived experiences of children" (p. 21).

Despite the adoption of inclusive education by the South African national Department of Education (DoE), there is disparity between the policy and what actually happens in schools. This dilemma is adequately illustrated by the 260 000 to 280 000 children with disabilities who are still excluded from the South African education system. These children do not receive "proper care and provision" (Soudien & Baxen, 2006, p. 152) eight years after WP6 was published and despite the publication of subsequent DoE documents such as the Conceptual and Operational Guidelines for the Implementation of Inclusive Education and the Draft National Strategy on Screening, Identification, Assessment and Support (Department of Education, 2003, 2005 and 2006). This publication, now known as the SIAS document, has been printed in a glossy and user-friendly format and was circulated to all schools in 2008. Although this document was meant to further facilitate the implementation of inclusive education since the publishing of White Paper 6 (2001) children continue to be actively excluded from the South African education system. The study seeks therefore to understand why it is that some principals, despite the insurmountable problems associated

with it, rise to the challenge of inclusive education. This study will explore how the principals of schools understand the concept of inclusive education, how they prepare their staff and learners to accommodate children who are different, how they themselves facilitate the process, and how their understanding of inclusive education affects the practice of inclusive education in their schools.

Research findings on inclusive education in South Africa are constrained for several reasons. Firstly, the available literature (for example, Ainscow, Booth & Dyson, 2004; Ballard & MacDonald, 1998; Evans & Lund, 2002; Kenny & Shevlin, 2001; Messiou, 2006; Mordal & Strømstad, 1998; Persson, 2000; Sands, Kozleski & French, 2000; Vlachou, 2004) deals with inclusive education mainly in the North[1] which means that these studies are not necessarily applicable to developing countries. This does not mean that important and timely studies are not slowly emerging from developing countries, studies which contribute to the understanding of the inclusive process in developing contexts (see for example Engelbrecht, Swart, Eloff & Forlin, 2000; Howell & Lazarus, 2003; Koen, 2003; Maghuve, 2003; Pandey & Moorad, 2003; Sathiparsad, 2003; Sayed, 2003; Singal & Rouse, 2003; Sokoya & Muthukrishna, 2003; Swart, Engelbrecht, Eloff & Pettipher, 2002; Swart & Pettipher, 2005; Watermeyer, Swartz, Lorenzo, Schneider & Priestly, 2006; and Wildeman & Nomdo, 2007). Limited inclusive education *is* therefore taking place in South Africa, but with a time frame of twenty years for implementation, the imperative to respond to WP6 is critical.

Although the practice of inclusive education occurs on a limited scale in South Africa, what is not available is a wide knowledge base on how it is being practiced and in particular, how it is being practiced in *independent* South African schools. Several authors (Henning, 1993; Du Toit, 2004; Herman, 2006; Hofmeyr, Dhunpath, Mosang & Lee, 2006; and Hofmeyr & Lee, 2003 & 2008) who have written about the characteristics of independent schooling in South Africa, have omitted making references to disability or even to how many independent schools cater for children with disabilities. This point is further reflected by the Independent School Association of South Africa (ISASA) which does not yet have a clear mandate for inclusive education for its member schools. Taylor (2005) makes the point in her study of special education and private schools in the USA, that there, as in South Africa, is very little research on the nature of service provision to students with special needs in the existing private schools. If there is little research in developed countries, it is likely that there is even

less research in South Africa as a developing country where educational structures lack resources in some schools, and where inclusive education is still in its embryonic stage.

1.5   MY SPECIFIC STUDY

In the light of the previous discussion, I have opted to study principals in independent schools. The principals I have earmarked to be studied are all incidentally from well-resourced independent schools even though the overall profile of the independent schools in South Africa is not one of being well-resourced (Du Toit, 2004 and Hofmeyr & Lee, 2008).

A secondary focus of this study is on inclusive education in a developing country. In the international research on inclusive education, it is clear that inclusive education has changed some education systems in developed countries (see for example Ainscow, 2005; Evans & Lunt, 2002; Graham, 2006; Messiou, 2006; Mittler, 2000; Sands, Kozleski & French, 2000; and Vlachou, 2004), and although there is an increasing amount of research taking place in developing countries such as India (Corbett, 2001), Lesotho (Mittler, 2000), Botswana (Pandey & Moorad, 2003), and South Africa (Soudien & Baxen, 2006; Swart, Engelbrecht, Eloff & Pettipher, 2002; and Watermeyer, Swartz, Lorenzo, Schneider & Priestly, 2006 amongst others), much of the current research on inclusive education has taken place in so-called first-world countries. At this stage therefore the existing research concerning inclusive education is skewed and therefore lacks empirical evidence for developing countries in a number of areas, including in how principals understand inclusive education. Swart and Pettipher (2005) argue that as a developing country, South Africa has "an opportunity for developing a unique inclusive education system that is not a blueprint for an existing one" (p. 21). In order to contribute to this unique 'blueprint', an important area to be investigated in this study therefore is to find out, through their stories, how principals understand the inclusionary processes in their individual schools.

1.6   PURPOSE OF THE STUDY

This study could contribute to the existing knowledge base on inclusive education in a number of different ways. It will reveal how principals in several well-resourced independent schools understand inclusive education. It will clarify how the understandings of principals

shape, drive, limit or facilitate inclusive education in independent schools. On a broader level, the study may contribute to the international knowledge base of inclusive education implementation, but more specifically the study may contribute to the knowledge base of inclusive education in *developing* countries. The study may also inform others who wish to introduce inclusive education into their own schools.

The unique context of this study is concerned with several independent South African schools which have taken on the challenge of being inclusive. Although many countries have inclusive educational policies in place, the literature (Angelides, 2004; Armstrong, Armstrong, Lynch & Severin, 2005; Evans & Lunt, 2002; Luk, 2005; Hunt, Hirose-Hatae, Doering, Karasoff & Goetz, 2000; Messiou, 2006; Palley, 2006; Daane, Beirne-Smith, & Latham, 2001; Taylor, 2005; Vlachou, 2004; Wedell, 2005; and Ypinazar & Pagliano, 2004) reveals that in each country, and indeed in each school, inclusive education is understood and implemented in unique and innovative ways. The variety of understandings of principals may serve to make the debate more interesting and each attempt, however small, contributes to the worldwide challenge for more inclusive endeavours in education. Hence, an analysis of inclusive education in a developing country could be a unique contribution to both the national and the international debates on inclusive education. What follows is an overview of several pertinent questions that relate to the study.

1.7   WHY INCLUSIVE EDUCATION?

Since the dawn of time, there have been power struggles for more democracy, more equity, more freedom for, and by, the marginalised. Recent struggles that illustrate this are the individuals who have deliberately chosen to go against the grain of mainstream society – individuals such as Rosa Parks, Martin Luther King and Ghandi to name but a few. It is not my intention to romanticise the actions of these individuals, but it is the very courage of pioneers like them that has paved the way for others to enjoy their rightful places in society. Other international events that further demonstrate the "slow march" towards a more inclusive society are the removal of the Berlin Wall, the end of the Cold War, "women's equity gains" (Blackmore, 1998) in all societal areas such as education, politics and welfare, the election of America's first Black president in Barack Obama, and closer to home, the triumph of democracy over apartheid. The implications of worldwide events such as these

have had positive outcomes for a more diverse and equal society and, no less, for children who have intentionally or unintentionally been marginalised in education.

Exclusionary practices in education have, as stated earlier, recently been scrutinised for their inappropriateness as far as exclusivity is concerned. Schools across the globe were originally reserved for children who were cognitively and physically capable of adapting to the existing educational system (Vlachou, 2004). Similar educational practices could be found in South Africa. During the apartheid era black people were denied basic human rights while black people with disabilities were further disabled by "inadequate rehabilitation and health services" (Du Toit, 1992, as cited in Howell, Chalklen & Alberts, 2006, p. 50) and inferior education for all children, which eventually led to mass protests vis-à-vis a substandard education system in 1976 (Howell, Chalklen & Alberts, 2006). Black children with disabilities who were fortunate to be in special schools encountered other problems such as inappropriate curricula and diminished opportunities for matriculating and hence lack of access to higher education (Howell, 2006). Disablists[2] and human rightists such as Howell (ibid) have drawn attention to the fact that special schools that were created outside of the mainstream system to cater for children with special needs, were in fact themselves the catalysts of exclusionary practices (Vlachou, 2004). By separating children, even if it was to solve the problem of how to 'educate' them, special schools unwittingly polarised and categorised children and regarded them as 'Other'. Creating separate spaces for children who were seen as 'Other', not only effectively removed them from participating fully in society, but also made them conveniently invisible. Watermeyer (2006), with his psychoanalytical stance, compares the response to those seen as 'Other' with the social constructionist view "whereby we identify a devalued 'other' in society, in order that we may then attribute to members of that group those parts of our own experience and selfhood we wish to disown" (p. 33). Put differently, neurotypical society reinforces their own identity as being that which is opposite to all the "undesirable traits" (ibid) of individuals with disabilities which includes feelings of vulnerability, dependency on others and fears such as being unacceptable to others, unlovable or inadequate (ibid). Furthermore, and on a different note, effective and efficient exclusion has a double entendre for it not only *keeps* people out, it also *pushes* them out (Mitchell, 2006). By practicing exclusion, society not only practices oppression but is also in some sense the *cause* of disability (Priestley, 2006).

1.8 WHY THE FOCUS ON PRINCIPALS?

One of the reasons that school change is effective in some schools is because the leadership has the courage to make the changes that are needed, even in the face of tradition, opposition or resistance. Many authors such as Angelides (2004), Daane et al. (2001), Hunt et al. (2000), Mittler (2000), Palley (2006) and Taylor (2005) note that there is a great deal of evidence to prove that school success is determined by a strong and motivated leader. In addition, one of the elements of the kind of educational change that results in more inclusive education is "a shared vision of preferred conditions for the future" (Swart & Pettipher, 2005, p. 19). This "shared vision" needs to be driven by someone and who better to do this than the school principal? Conversely, Evans and Lunt (2002) found that a lack of strategic leadership compromised the implementation of inclusive education in a school because it was seen to be a controversial policy by certain sectors of the population.

In a rapidly changing and pressurised world, a principal's role is complex and varied and it is not made easier by the demands placed on her as leader, manager, enabler, organiser and administrator. Often, as a result of an increase in administrative paperwork, "[p]rincipals perceive their energies are being deflected away from the core work of education, teaching and learning" (Blackmore, 1998, p. 465). Fiscal issues can be an additional problem for principals because they are related to enrolments. In South Africa, schools are being severely affected by mixed messages from the DoE regarding free education at primary school level. One of the results of the push for free education is that the energy of principals is spent on fundraising because of non-payment of much-needed school fees. In addition, schools face the further problems of achieving one hundred percent pass rates (Jansen, 2006), of competing markets and of poor teaching performance. These pressures all negatively impact on the implementation of what is perceived to be yet another new system by educators namely inclusive education. Vlachou (2005) points out that "[i]n a market driven economy, vocational training and education, any commitment to inclusive priorities will be considered by schools and teachers as an extra burden" (p. 7). Mittler (2000) too points out that a main obstacle to inclusive education is the perception by teachers that children with special needs require extra work. However it has been noted by the same author that these negative attitudes are exchanged for more positive perceptions once they start working with these children (ibid). Other research shows that the majority of teachers (17 out of 19) in one

survey described being positively transformed by their experiences after an initial negative attitude towards children with special needs while the minority (2 out of 19) "reported no change in their original perceptions" (Hunt & Goetz, 2004, p. 439, and Wilson, 2004). The transforming experiences included "increased ownership and involvement" (ibid) with the students, a willingness to engage more with them, and a willingness to improve their knowledge of teaching methods (ibid). In addition, the same authors reported that these teachers identified benefits of inclusion that they discovered for themselves such as deeper thought processes regarding inclusion than before, more awareness around teachers being positive role models, a sense of pride in being open to change, more confidence and improvement in the way they taught (ibid). Still other research found that if teachers are not consulted on inclusion, or if their concerns are not addressed, they display "malicious" or minimal compliance which effectively undermined the process (Wilson, 2004, p. 229-230). Stanovich and Jordan (2004) discuss research by Jordan and colleagues that places the attitudes of teachers on a continuum. Teachers that were more "pathognomonic" (p. 201) or who, similar to the medical model, believed that problems exhibited by children exist *within* the child, were resistant to diversity within their classrooms whereas teachers who were more "interventionist" in their outlooks believed that problems are as a result of the interaction between the child and the learning environment. These teachers interacted more with their students and were more active in assisting the children who needed it in their classrooms.

Vlachou (2005) correctly points out that as a result of all of the complexities surrounding inclusive education such as leaders not taking the initiative to drive inclusion in their schools, there may well be an increase in "separate and unequal schooling" (p. 14). A concern is that as a result of opposition to the process, there have been subtle changes to legislation and policies in the international arena, such as in the UK, that now permits "limits to full inclusion" (Evans & Lunt, 2002) in the 'market place'. Furthermore, in the post-modern world, a market place that is shaped by the terminology of success has "influenced the shift from the classical meaning of citizen to the notion of active citizen – accountable for his/her own failure" (Vlachou, 2005). This fixation and pursuit of random perfection is counterproductive and may contribute to the so-called fossilisation of the capabilities of students (Robbins, 2003) when we choose to judge them according to our own constructs of what we perceive to be 'successful'.

If inclusive education is to succeed in schools, it will require committed leaders that are able to avoid the pressures to compete in a market-driven economy where the danger for schools is that "market values will drive out virtue" (Sergiovanni, 1998, p. 593). As Blackmore (1998) points out, the market complicates matters immensely for it replicates the status quo by encouraging "conformity and not diversity" (p. 468). Furthermore, as Allen and Glickman (1998) stress, meaningful change does not take place when policies or procedures are changed but rather when the "hearts and minds of the people in schools ultimately dictate what happens in classrooms" (p. 505).

1.9   WHY THE FOCUS ON INDEPENDENT SCHOOLS?

In developed countries, independent schools are preferred choices either because of the quality of education they offer or because they provide opportunity for a particular identity, very often religious (Henning, 1993, Boyd, 2001). Henning (ibid) points out that in many developing countries, private schools cater for children who are unable to gain access to public schools because supply falls short of demand. In South Africa, independent schools have always been seen as providing education to the children of the elite and are therefore perceived to be out of reach of the majority of children. Since the beginning of the new democracy in 1994 however, the role of private schools has changed. In the last fifteen years we have witnessed a decline in the quality of education in many state schools to the extent that the longer that some children stay in school, the less they know (Jansen, 2006). The result of this phenomenon is that children who have the will to learn and improve their lives are forced to become "outsiders" as they pursue alternatives to state schools, which they do rather than face the reality of their own diminished dreams. This is however not always possible due to financial constraints and limited spaces in independent schools.

There is no guarantee however, that an independent school offers quality education. Many fly-by-night schools (Du Toit, 2004) are only interested in financial gain. Unlike other countries such as Holland where the Dutch government willingly provides funding for all its schools whether independent or public (Boyd, 2001), the South African government often views independent schools with suspicion and has been known to reduce subsidies to these schools (Herman, 2006). Taylor (2005) believes that the suspicion of independent schools is sometimes justified because knowledge surrounding the services provided to students,

especially to children with special needs, can be limited. She found in a USA study that there are "no large scale requirements for private schools to disclose the details of their schools to outside agencies" (p. 282). Furthermore, a rather disturbing trend in independent schools is when token or superficial inclusion is passed off as diversification. In her research, Taylor (2005) found that when schools referred to 'diversity' in their mission statements, the actual practice of diversification did not in fact include the category of children with special needs. 'Diversity' in most cases referred to race, religious persuasion, gender, cultural or ethnic designation. Ability was often conspicuously absent.

A further note on independent schooling in South Africa includes a recent report on the independent school sector in South Africa by Hofmeyr and Lee (2008) which describes the dramatic change that has taken place in independent schooling in the last ten years. The first paragraph states, "[t]he size, diversity and socio-economic spread of the private (independent) schooling sector has changed significantly in the last decade" (p. 1). The report then goes on to say that the perception that independent schooling in South Africa is "white, affluent and exclusive" (ibid) is now far from "the current reality" (ibid). In fact the report continually refers to how more diverse independent schooling has become, not only as far as race is concerned, but also as far the diversity in the amount of fees charged by schools. Not all independent schools charge high fees and the report quotes HSRC research which found that "in 2002, the majority of independent schools charged fees below R6 000 per annum. Adjusting for inflation, this is less than R8 000 per annum in 2007" (ibid, p. 9). So the perception that all independent schools are affluent is simply no longer the case. Amongst the number of independent schools in South Africa, some are extremely poor and depend heavily on state subsidies and funds from other sources. Once again though, the diversity referred to in the report does not include having children with disabilities in mainstream independent schools. What is referred to as diversity is *racial* equity, which incidentally remains predominantly white, and *gender* parity which at 54 percent is in line with the 52 percent in state schools (ibid). The article suggests that independent schooling has taken on a new face: there shall be no further discrimination on the basis of race, there will be respect for human rights, there will be protection against sexual offences, the termination of pregnancies can be allowed, and there shall be no unfair discrimination against religious dress. The adherence to children's rights however still inexplicably and unfairly precludes children with disability. The topic of disability is notable by its absence in

the report and one can only assume that disability is not seen as being part of the diversification of independent schooling at this stage.

Nevertheless, the significance of independent schools is this: independent schools are an important part of the educational milieu in South Africa and the majority of them play a crucial role in providing consistently excellent education and an alternative to the norm. As Henning (1993) circumspectly points out, independent schools have the capacity to "further individualism which will in fact work against policies that entrench dominant elites" (p. 21). My interest in how principals in independent schools understand inclusive education will therefore include the potential that they have as leaders to facilitate change in the lives of their students. The first schools in South Africa to cater for children with special needs such as deafness, cerebral palsy and intellectual impairment were after all, private ventures (Henning, 1993). Independent schools then, are already pioneers in providing education to children who would otherwise have remained outside of the school system. The challenge now is to find out how much more they can do in leading the way to more inclusive schooling in South Africa.

1.10   INCLUSIVE EDUCATION IN INDEPENDENT SCHOOLS

Very little documentation surrounding inclusive education in independent schools in South Africa exists. The available literature on independent schools describes independent schooling in terms of racial, gender or financial terms (Du Toit, 2004; Hofmeyr & Lee, 2008; and Wildeman & Nomdo, 2007) and very rarely in inclusive terms. As already mentioned ISASA does not have a clear mandate for the practice of inclusive education in its member schools. I hypothesise therefore that schools practice inclusive education as a result of personal choice and in response to the national policy on inclusive education. This study may therefore contribute significantly to the knowledge base regarding how principals understand inclusive education in independent schools and how this understanding affects the practice of inclusive education in independent schools in South Africa.

1.11   HOW I CAME TO DO THIS STUDY?

The result of any research is inevitably informed by the researcher's own world views, experiences and theoretical framework, as well as an understanding of how the literature review will be used in a specific study at a particular point in time. I am therefore obliged to outline my own position within this study. In my thirty-year career as a teacher, I have taught in both special education and mainstream schools. I have a deep knowledge and experience of a number of disabilities including deafness, Down syndrome and cerebral palsy, foetal alcohol syndrome as well as, in my estimation, the most debilitating of all, the autistic spectrum disorder (ASD). I am the published author of a basic handbook for mainstream teachers and parents entitled 'Learners with Special Needs' (Gous & Mfaswe, 1998). I also spent two years attending a Bible college in the UK with a view to doing some kind of mission work. After one and a half years of working for a small-town Anglican church as a pastoral assistant, I felt 'called' back to teaching (and the attraction of city life).

It was during my career in special education that my awareness of *exclusive* education grew and contrary to many of my colleagues, supported the notion of inclusive education when it started emerging in South Africa in the nineties. After being exposed to the concept of inclusive education, I became a "curious and dissatisfied traveller" (Hernández & Goodson, 2004), and a restless artist (Lincoln & Denzin, 2000, p. 1061). As a 'special needs' teacher my undertaking is therefore to study a phenomenon I believe in and wish to facilitate. Moreover, in the foreword of a new South African book entitled "Disability and social change" (2006) Lewis Nzimande, an MP and national chairperson of Disabled People South Africa, invites researchers to "make your *[sic]* own contribution to enhancing the rights and opportunities of disabled people in South Africa" (p. ix). I have accepted this invitation in the hope that my contribution will be added to the voices of those calling for academia to be a site of struggle for the disability discourse. The "slow march" towards a more inclusive society does however occasionally make tangible headway. For example, history was recently made at the 2008 Olympics when, Natalie Du Toit, the only amputee who has ever participated in mainstream Olympics, was chosen to be the flag-bearer that led the South African team into the Bird's Nest in Beijing. This was the first time that an individual with a disability has led a team of athletes into any Olympic stadium. One can only hope therefore that because of academia, the "systematic subjugation, even after 11 years of democracy"

(Watermeyer, 2006) of individuals with disabilities will no longer be overshadowed by other social issues and that the provisions existing in the South African Constitution will be made real for those with disabilities in our country. Putman (2005) argues that only a small fraction of people with disabilities are involved in disability rights issues and that as scholars of the subject "we not only develop our intellectual knowledge on this issue but provide insight into the potential of motivating people with disabilities into greater political action" (p. 188).

And finally, I am working within the parameters of the "African Decade of Persons with Disabilities" which ranges from 1999 – 2009 and which was declared in order to find "local solutions to local problems" (Chalken, Swartz & Watermeyer, 2006, p. 93). It is my hope that the knowledge generated in this study will contribute to the "local solutions" of some of the "local problems" embedded in our current education system.

I approach this research from a unique standpoint for a number of reasons. Firstly, as a woman in a man's world I am perceived and treated as 'Other' in the sense that I am not a member of the dominant patriarchy that characterises our society. This patriarchy is especially prevalent in African contexts where it is particularly pungent for cultural reasons. In a patriarchal world, as I see it, not being a man means not having quite 'made it' as a human being. My choice to use feminism as my theoretical framework therefore, is a way of counteracting and challenging my position as a woman in a patriarchal world. The appeal of a feminist framework is the identification with, and a desire for, equality in the biased and dualistic space we humans inhabit.

Secondly, my experience as a principal of a school for children with ASD provides me with a deep understanding of children with special needs. While I recognise my own longing to see these children being far more included into schools and into society than they are, I also know what it means to manage a school and to understand how an institution can be directly influenced by one key individual. I can testify to this as a result of my own experience as a teacher. Out of nine principals I worked under during my career, only three of them (two female, one male) was inspiring, encouraging and exemplary as a head. Their leadership allowed me to flourish as a teacher and when I worked for them, I looked forward to going to school every day. I learned from them, I wanted their input and having them as a head equipped me as a teacher. The other principals (four male, two female) were either

ordinary, uninspiring, lacked insight, were defensive or were limited in allowing others to grow as people and professionals. The schools were influenced profoundly by their headships and were either friendly, relaxed, productive spaces, or they were filled with drudgery, vacuous routines and rules and were autocratic to the extent that roles were fulfilled and performed reluctantly.

I have often questioned my own empathy for children with special needs and why I find working with these children so alluring. I have also questioned why I feel so strongly about including them into the mainstream, whether into schools or into society at large. To answer these questions I need to take the risk of exposing my own 'special need'. This risky[3] exposure is no easy option for me. I have decided to do so however (with the support and encouragement of key people) for the sake of academia and for the sake of authenticating this study. In addition, I am compelled to acknowledge my stance because as my experience is a *political* one. This belief is echoed by Lugg (2006) who included a quote by Riviera (1999b) at the beginning of her chapter in a book on qualitative research which says "[r]emember when you wake up in bed with a person of the same sex, you are now in politics" (p. 1198). My sexual orientation is "something that happened a long time ago" (Lubbe, 2005, p. 310) and in some ways I have made peace with it, even to the extent of celebrating it, but I know nevertheless what it is like to be marginalised by others who represent the so-called 'norm'. I know what it is like to walk in the dark caves of loneliness, rejection, and even revulsion. I know what it is like to be in the company of those who gay-bash or who unknowingly snigger at jokes about homosexuals. I have intimate knowledge of what it feels like to be treated as the exception, the ostracised and the perverse. I once thought that I had found a home in the Church, an accessible space that *should* represent full inclusion for all its members if it is to reflect the Christ that stands for justice and belonging, but I soon realised that unless I played their game (of being heterosexual *and* married), I would never be fully accepted as an equal human being. I can identify with Ferguson (2005), a recovering heroin addict who despite staying clean and 'fitting-in' still feels like an outsider. She says, "I was to discover that standing outside the loop, and looking longingly through the glass at those inside, wining and dining at the table of 'life', was still to be my destiny…" (p. 290).

Furthermore, I know what it means to have a label and an identity that is not my own. I know what it means trying to live within the parameters of a society that is largely ignorant of anything other than the norm. I know what it is like living with myself, of trying to live up to the unattainable expectations of others, of trying to turn away from who I am, of trying to follow the broad path that belongs to the so-called 'straight', of living with deep, inextricable and onerous contradictions that never diminish. For these reasons, I feel qualified to try and understand the puzzle surrounding the attitudes and the apparent reluctance to include children with special needs and to question why it is that defenceless[4] as they are, they face the triple jeopardy of firstly, living with one or more disabilities, secondly, of very often being excluded from many aspects of society and treated as 'Other' through no fault of their own and, thirdly, of being ridiculed and being at the receiving end of cruel and heartless rebuttals.

I approach this research as a feminist because feminism coincides with my status as a woman in a patriarchal world. I know what it is like living with the perception of being 'Other' in a homophobic world. In a sense, I see myself as being 'socially disabled' and agree with O'Brien (2003) who believes that it is time that those who are usually the focus of research, opt to counter the norm, and *themselves* become the researchers.

Any human experience is expedient for it shapes and equips one to have a unique point of view. I believe that it was my sexual orientation that predisposed me to think differently even before I knew what being homosexual meant. Even as a small child, for instance, it did not make sense to me that people lived separately and in such contrast to one another. I learnt soon enough that this topic was never up for discussion. I was equally appalled to find out later on in life that my parents supported the apartheid status quo, a tour de force which I felt was in direct contrast with the Christianity that saturated my upbringing and which I felt I understood differently from what I had been taught in church. I could not understand how their opinion of people they regarded as 'Other' could begin and end with what I regarded as such a skewed understanding of life. But as Clandinin and Connelly (2000) argue, it is as we do research that,

"...we become visible with our own lived and told stories. Sometimes this means that our own unnamed, perhaps secret, stories come to light as much as do those of our participants. This confronting of ourselves in our narrative past makes us vulnerable as inquirers *[sic]* because it makes secret stories public. In narrative research , it is impossible (or if not impossible, then deliberately self-deceptive) as researcher to stay silent or to present a kind of perfect, idealized *[sic],* inquiring, moralizing *[sic]* self" (p. 61-62).

Finally, I feel compelled to write. Along with my participants, we will invent (Brady, 2005) a thesis, we will be the yeast (ibid) that will give rise to a brand new narrative that may help to take the notion of inclusive education from the margins of traditional education nearer to its centre (ibid), where boundaries may blur and a more meaningful dialogue about oppression may emerge. This will be done with the full knowledge that I may well only end up with "a distorted image of what is really there" (Neuman, 2000, p. 48) but nevertheless will press on in the hope that the final product will be "carnivalesque" (Plummer, 2005, p. 366), a celebration, and a discourse full of hope.

This study will need to be rigorous, for I share Richardson's question which asks, "How can I make my writing matter? How can I write to help speed into this world a democratic project of social justice?" (Richardson & St Pierre, 2005, p. 967), because like her "when I move deeply into my writing, both my compassion for others and my actions on their behalf increase" (ibid). It will therefore be a writing "that decrease[s] the inequities between and among people and peoples and that decrease[s] the violence" (ibid). In addition St Pierre (Richardson & St Pierre, 2005) say that "writing *is* thinking, writing *is* analysis, writing *is* indeed a seductive and tangled method of discovery" (emphasis hers) (p. 967) and it is open to different meanings (ibid). But, she feels that writing should "disrupt the known and the real" (ibid). In this sense then my own writing will be a "field of play", (ibid, p. 969) a space where, along with the participants, we may "cobble a story" (Lincoln & Denzin, 2000, p. 1062) that will disturb and encourage new ways of understanding children and education. Ellingson (2009) too encourages writers to resort to "guerrilla scholarship" if necessary to ensure that one's writing "gets done and published" (p. 134). She says that if one's writing will help others, will bring about social justice, will illuminate complex issues or will influence a discipline, and even if it does not sit comfortably in mainstream academia, one has the

responsibility to write. This writing therefore is a sacred quest that I cannot ignore and am compelled to complete.

1.12   PURPOSE STATEMENT

In the light of the above discussion, the purpose of this study is then to explore and to explain how principals understand inclusive education in independent schools in South Africa and what the implications of their understanding has on the practice of inclusive education in their schools. I am assuming that principals are instrumental in introducing inclusive education into their schools and I therefore wish to come to terms with why principals would be open to including children with disabilities into their schools. The study aims to clarify and uncover how principals understand inclusive education in well-resourced independent schools in South Africa and how their understanding affects the practice of inclusive education.

1.13   RESEARCH QUESTIONS

The research questions that arise out of this study are:
•   How is inclusive education understood by principals in independent South African schools?
•   What implications does the understanding of inclusive have for the practice of inclusive education in individual schools?

1.14   CONCLUSION

The remainder of this study is organised into four chapters, endnotes, a list of references, additional references, as well as appendices in the following manner: Chapter Two presents a literature review that sets the scene for the study. Chapter Three outlines the methodology and research design of the study. The instrument used for collecting the data, the method used for the selection of participants, and the procedures that are followed in this study are delineated. In Chapter Four the data are presented with extensive data segments. This chapter is longer than the other chapters because of the genre that is utilised for the setting out of the data segments. In view of the richness that the data brings to the

study, omitting any of the sections would be detrimental to the outcome and major findings of this study. Included in Chapter Four is an analysis of the data as well as the major findings. Chapter Five contains the summary, conclusions, and recommendations of the study. The study concludes with endnotes, a reference list and appendices.

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2.1 INTRODUCTION

This chapter deals not only with a comprehensive review of the literature on inclusive education but also with a more than cursory examination of related issues. Disability issues are a large part of this analysis as they are directly pertinent to the study of inclusive education. My particular concern is for vulnerable children who are sidelined and even ridiculed because of their disabilities.

The concept of inclusive education is discussed and this is then followed by types of inclusion as described in the literature. A quest to define the pervasive term 'inclusive education' is made, as well as a careful analysis of inclusion as a broader societal issue. The location of the problem is examined in terms of whether individuals are included or excluded on the basis of prejudice within society or whether the 'problem' is located within the individuals themselves. In addition, the relationship between identity and learning is probed as is the relationship between normalisation and deviance. Children on the whole are sometimes expected to be seen and not heard and yet the importance of listening to children and especially children with disabilities is a facet this study interrogates. The concept of 'Other' and 'silence' is explored as is the role that principals can play as agents of change. The bias of the educational change literature is put under the microscope and the concept of feminist research is reviewed.

2.2 THE CHALLENGE OF INCLUSIVE EDUCATION

What is the reason for having introduced inclusive education into schools on a national level? To some, the adoption of inclusive education into the South African educational system seems to be an impossible, and even irresponsible, undertaking in the face of the current problems in education. According to an HSRC report (2005), some of the problems that face education on a national scale in South Africa includes poverty, the gross inadequacies and inequalities in rural schools, the AIDS pandemic, poor infrastructure,

disempowered communities and a large number of under-qualified teachers (HSRC, 2005). Other problems that complicate the current education milieu in South Africa include many anecdotal reports of school failure and retention rates, a lack of financial and material resources, poor discipline, drug abuse, lack of safety and security, weak management and unmotivated teachers especially in the rural areas where the majority of South African children attend schools (ibid).

The key purpose of primary schooling is to provide basic education in literacy and numeracy and yet research shows that many South African schools are struggling to achieve even this (HSRC, 2005). What was the rationale then when inclusive education was adopted by the Department of Education? The transnational initiatives lead one to believe that inclusive education *is* a desirable option for all children, not only for moral and ethical reasons, but also because inclusive education offers solutions to an existing system that continually fails to prepare its students for an ever-changing world (Vlachou, 2004). The evidence then is that inclusive education is indeed attainable as a number of schools throughout the world have so adroitly demonstrated (Angelides, 2004; Ainscow, 2005; Ainscow, Booth & Dyson, 2004; Berrigan & Taylor, 2005; Booth & Ainscow, 2000; Chataika, 2004; Cook, Swain & French, 2001; Corbett, 2001; Luk, 2005; Sands, Kozleski & French 2000).

I shall now briefly examine the beginnings of inclusive education in South Africa. In his introductory speech to WP6, the then Minister of Education, Kader Asmal was quite clear that the intention of the state was to reconstruct the past by restoring inherited imbalances, including to individuals with disabilities, in the new South African democracy. As illustration he said:

> "It is therefore, another post-apartheid landmark policy paper that cuts our ties with the past and recognises the vital contribution that our people with disabilities are making and must continue to make, but as part of and not isolated from the flowering of the nation" (WP6, 2001, p. 4).

So the intention to include individuals with disabilities in a new dispensation is obvious. The Minister was not clear however, on *how* education will alter to the extent that *all* children will be included in an inclusive educational system. All he said was, "[t]hrough this White Paper, the Government is determined to create special needs education as a non-racial and

integrated component of our education system" (p. 4). The inherent contradiction in what he seems to have said here is that special education will in fact remain in place and that the only thing that will change is that special needs education will no longer be *racially* segregated. This is an apparent, and somewhat confusing, ambiguity. The South African Minister of Education who came after Asmal, Naledi Pandor, was perhaps a little clearer in her intent in making education more inclusive when she said "[o]ur ultimate aim is to ensure that no child is excluded from school on the basis of disability or poverty."(Pandor, 2004). She conceded however that special schools would still have a role to play in the country. In a later speech in 2005, Minister Pandor was still saying that special schools will remain in place and that they will in fact be reinforced. She said,

> "[s]o even while we will strengthen special schools, our policy is that children with intellectual disability should attend local neighbourhood schools, our policy is that they should attend ordinary schools where they can benefit from educational opportunities that are available to all learners" (Pandor, 2005).

Once again there is ambiguity about the role of special education as opposed to where children with disabilities will be educated. Although The South Africa Schools Act 84 of 1996 states that: "A public school must admit learners and serve their educational requirements without unfairly discriminating in any way" (5(1)), Swart and Pettipher (2005) point out that "the Act also contains gaps and weaknesses, mainly in the wording of some of the clauses, which restricts the rights of learners experiencing barriers to learning and undermines the development of an integrated inclusive education system" (p. 17). Although compulsory exclusion from school has been brought to an end in South Africa (Lomofsky & Lazarus in Swart & Pettipher, 2005), the existing loopholes and lack of clarity concerning education for children with disabilities is in stark contrast to the directives for educational practices in other countries. In the USA for instance, the Individuals with Disabilities Education Act (IDEA) *mandates* services for students with disabilities in public schools (Taylor, 2005). There is no ambiguity here and furthermore, IDEA leaves no doubt about the kind of schooling that is, by law, available to all children. The South African stakeholders in the inclusive education process can thus benefit from others such as the developers of IDEA as to how to be clear and unambiguous in describing the provision of a more inclusive educational system.

As a developing country Southern Africa also has lessons to teach others about inclusive practices however. An example of this is a neighbouring country, the small land-locked kingdom of Lesotho which, driven by its commitment to EFA, launched a pilot programme in 1993 whereby ten rural schools included all children, including children with disabilities, from their local vicinities in their regular classrooms (Mittler, 2000). Although teachers received an intensive three-week training, Mittler found that they were already being inclusive with 50 to 100 children in their classes. These teachers "never lost track of the need to include all children in the lesson" (ibid, p. 27). According to Mittler "so-called developing countries have much to teach richer countries about inclusion" (p. 28). Other countries that are making progress with inclusion according to Mittler, include Uganda, Ghana, Vietnam, the People's Democratic Republic of Laos, India and China (ibid). On the other hand, a UNESCO study demonstrates that only 2% of the 150 million children with disabilities in developing countries are receiving any kind of special needs services (Eleweke & Rodda, 2004). These aforementioned authors report that in many developing countries services are found mainly in urban areas and that children in rural areas stay at home because of lack of transport and the high cost of travelling. Twelve million children with special needs are still out of the educational system in developing countries. India for instance only caters for 0.002% of its children with special needs, or 60 000 out of 30 million children (ibid). In contrast, the majority of children with special needs receive educational intervention in Europe. Developing countries still have a very long way to go in providing equitable education to its children with disabilities and special needs.

In South Africa there is an underlying belief that WP6 is not clear enough about how stakeholders need to go about implementing inclusive education. This perception may exist because WP6, as mentioned earlier, is to some extent ambiguous about *how* inclusive education should be implemented. Later documents that have been written since WP6 are acknowledged attempts to clarify how to implement inclusive education such as the Draft National Strategy on Screening, Identification, Assessment and Support (2005 and 2006) which states that this "strategy outlines the roles of teachers, parents, managers and support staff within the framework of a completely new vision of how support should be organized *[sic]"* (2006, p. 3). How inclusive education is actually being implemented in schools however, remains open to interpretation and context specificity. This study seeks therefore to comprehend how principals, in particular, understand the concept of inclusive

education, for it is my assumption that it is in the understanding of inclusive education that principals shape the implementation and practice of inclusive education in their schools. Sutton and Levinson (2001) maintain that it is practice that gives meaning to policy and this practice is therefore a dimension to be examined in this thesis.

The Salamanca and Dakar statements are clear that *no* child should be marginalised. Similarly in our own setting, WP6 makes provision for and "enables education structures, systems and learning methodologies to meet the needs of *all* learners, not just those with disabilities" (Swart, Engelbrecht, Eloff, & Pettipher, 2002, p. 81) [*emphasis mine*]. In the same way, Sands, Kozleski and French (2000) believe that inclusive education is firmly based on the premise that *all* children can learn and belong to one school. They point out that "organizational *[sic]* policies, structures, and practices" (ibid) need to respond to the needs of *every* child. In its quest for a more inclusive system, the USA, guided by IDEA, has adopted a strategy called the 'No Child Left Behind' policy. In New Zealand, a policy has been introduced to address the weaknesses, that is the exclusionary practices, in the mainstream educational system (Corbett, 2001). Similarly, India has addressed the anomalies within their education system and have introduced the concept of home schooling in the slums albeit with limited resources (ibid). In Africa, Bostwana has incorporated the African concept of 'Botho' (Pandey and Moorad, 2003) into its educational system. This Setswana word "is the equivalent of *compassion*" (ibid, p. 153) (original emphasis), and embodies the concept that "no Motswana will rest knowing that another is in need" (ibid). One of the problems with exclusive schooling in South Africa then, is that it stands in direct contrast with that which is deeply embedded within its own *naturally* inclusive 'Africanness'.

2.3   TYPES OF INCLUSION

At this point I should like to investigate the types of inclusion as formulated by a variety of authors. There is some controversy in the field regarding types of inclusionary practices in schools with one set of authors calling those who believe that they have the 'correct' model for inclusion in schools, the "anointed" (Kavale & Mostert, p. 193, 2004). Oliver (2004) speaks of the narrowness of the inclusionary debate which he interprets as being the tendency to focus on the quality of education provision while omitting the broader aspect of integrating children into society with citizenship rights as adults. In addition, those who

debate the issue at a political or academic level do so in the absence of those who have disabilities and who presumably know what is best for them in the first place. He quotes Barton and Corbett (1990) who label this type of discussion "fraudulent" (Oliver, 2004, p. 91) for they "underestimate the seriousness of the issues involved and the degree of struggle required for the necessary changes to be realised. Thus they are, in and of themselves, part of the disabling process" (ibid). Fuchs and Fuchs (2004) argue that the term "inclusive schools" defies interpretation as it "means different things to people who wish different things from it" (p. 166). What follows is an exposé of the different models of inclusion in schools and by its variety, the complexity of inclusionary practices becomes evident. Oliver (2004) argues that the education system has failed to empower children with special needs when he says,

> "[t]he history of the twentieth century for disabled people *[sic]* has been one of exclusion. The twenty-first century will see the struggle of disabled people go from strength to strength. In such a struggle, special, segregated education has no role to play" (p. 99).

So what are the alternatives? In the next section I attempt to answer this question by examining several different alternatives.

Norwich (2004) examines Low's distinction between hard and soft inclusion (1997, p. 103). This distinction investigates the role that support plays in inclusion. With *hard* inclusion, the mainstream setting takes full responsibility for all needs (also known as full inclusion, or the purist form of inclusion) whereas in *soft* inclusion, support is provided in mainstream schooling where and when it is required. Norwich then discusses four models for inclusionary practices which are:

•   Full non separatist inclusion

•   Participation in the same place

•   Focus on individual need

•   Elective inclusion

In *full non-separatist inclusion* all children are treated equally and there are no potentially 'stigmatising' support systems in place for children. This is a highly problematic model and yet it is supported by so-called full inclusionists who believe that inclusion should follow this

model. The second model, or *participation in the same place,* allows for support systems as long as these support systems assist with participation in the mainstream and do not occur in separate sites. The third model, or *focus on individual need,* focuses on meeting needs and the location in which they are met, is not prioritised. Participation in mainstream would be based on the necessity for socialisation with other children. Separate settings for meeting needs could therefore be defensible. The fourth model, or *elective inclusion,* focuses on the parent's choice for a separate setting for their child if this is their preference and this could be for any length of time.

Brown and Shearer (2004) distinguish between inclusion and 'quality of life' which in the field of disability is a notion more associated with adulthood. Their view is that inclusion does not necessarily lead to "philosophically inclusive outcomes" (p. 141) at all levels of involvement including leading independent and inclusive lives as adults. In Italy for instance, where so-called 'wild inclusion' took place, parents are now being faced with the problem that their included children lose their friends when their peers leave school. Employment opportunities are also restricted for their children and unless systems are in place to consciously include children at all levels in their communities, inclusion at schools remains "an isolated process" (ibid, p. 143). Embedded in the concept 'quality of life' is the understanding that individuals will have control over their lives and that it is "often equated with wellbeing, belonging and meeting of personal needs" (Goode, 1994; Renwick et al*.,* 1996; and Shalock, 1997 as cited by Brown & Shearer, 2004, p. 145). Inclusion, according to Brown and Shearer (2004) therefore, seldom prepares a child adequately for their older years as adolescents and adults.

Kavale and Mostert (2004) speak of "benevolent inclusion" as described by Stockall and Gartin (2002). Inclusion at a top 'blue ribbon' school was studied in the US and the conclusion the researchers reached was that rather than benefitting from their mainstream placement, children were masking their lack of attention and ability to learn by over-utilising coping mechanisms. In addition, Kavale and Mostert (2004) report that the so-called 'least restrictive environment' for children is problematic in that IEPs in these settings tend to be less individualised for the children they are meant to serve.

Meijer, Soriano and Watkins (2004) have grouped 28 European countries into three categories according to how they practice inclusion. Eight countries (Spain, Greece, Italy, Portugal, Sweden, Iceland, Norway and Cyprus) (p. 331) that use the *one-track approach* include almost all children in the mainstream and provide a wide range of support services within those schools. The majority of countries however use a *multi-track approach* which translates into being a variety of services that bridge special and mainstream schooling. These countries include Denmark, France, Ireland, the United Kingdom, Latvia, the Czech Republic, Estonia, Poland and Slovakia. A few countries such as Switzerland and Belgium use the *two-track approach,* or separate schooling with two separate educational and legislative systems. Countries that did not fall within any of these three categories such as Germany and the Netherlands were mostly in transition from a *two-track system* to a *multi-track approach.* The tendency in Europe then is a general trend of moving away from separate services for children with disabilities towards a more varied system meaning that "some countries defined their special needs education system as a resource for mainstream schools" (p. 332); parental choice has a part to play in legislative changes; legislation for secondary school education for children with special needs is being developed; and changes in funding have taken place.

Thomas and Loxley (2001) describe what they term as "pragmatic inclusion" (p. 107) which basically opposes inclusive education on the grounds that special schools have the "best menu of help" (ibid) for children who need support. The attitudinal trend that accompanies this philosophy is one which says "[w]e can't manage or cope with certain children" (ibid). Non-recognition and disrespect follow as inequalities are purposively left in place and as a result children become invisible, reduced as human beings and they remain dependent on others (ibid).

It is postulated that a new conceptual model is needed for the field of special needs education and that this new model be branded as the bio-psycho-social model (Norwich, 2004; and other researchers such as Cooper, 1996, Engel, 1977, and Kiesler, 2000). In this model both over-individualisation and over-socialisation is circumvented "while still recognising the individual location of problems for some children, whether these have been acquired environmentally or through biological involvement" (p. 113). This model or

framework is useful as it prevents emotional and behavioural issues from being interpreted as being bio-medical.

Some authors propose a system that consists of a continuum of services. Fuchs and Fuchs (2004) caution those who use the phrase "all children" (p. 174) when arguing for inclusion, specially full inclusionists who, say the authors, tend be exclusionary themselves when they display little regard for other points of view or when they disparage partial inclusions. In addition Fuchs and Fuchs (ibid) compare full inclusion with the deinstitutionalisation of mental patients in the USA. The late US psychiatrist Seymour Kaplan said that the principal mistake he made in his life was releasing patients with schizophrenia and manic depressive illnesses from institutions into society. As a result of this action, 250 000 of these patients ended up living on the streets and in prisons (ibid). Kaplan's plan failed because mainstream society could not cope with these patients, just as the patients could not cope with mainstream society. It would be detrimental however to draw direct correlations between patients with mental illnesses and individuals with disabilities since the two populations have differing needs. Fuchs and Fuchs (2004) suggest that there should be a continuum of services available to children as an alternative to special education which they describe as being "a second system" (ibid, p. 158) with its own budgets, teachers, principals and structures. In the same way, mainstream schools may not be in a position to cope with every child who requires support and full inclusionists could thus be out of touch with mainstream education as it presently is (ibid). Hegarty (2004) makes the point that education is about more than inclusion. Schools are about core human values that may not be compromised by inclusion. It is a school's responsibility therefore, that the majority of its children are taught the core subjects and are schooled in core human values in order that they might be educated and equipped for adulthood. As Hegarty (ibid) says, many of the students in a mainstream school have very little to do with "the everyday meaning of inclusion" (p. 189). Children in the mainstream may need as much support, and even protection, as those who are included as the focus should never deviate from the importance of core learning.

Thomas and Loxley (2001) focus on and compare differing approaches to schooling. According to these authors, the approach 30 years ago was the *therapeutic approach* which in turn gave way ten years ago to a *whole-school approach*. They hope that the next shift will be towards a "*humane environment approach*" (p. 120) which essentially means being aware

of, and manipulating, the environment in which children receive their education. In other words, the environment will be managed to ensure that the effect it has on its students benefits them maximally. Recommendations made by students in their study, for example, suggested having rest rooms for those whose disability causes them to tire easily (ibid). Children themselves could be given the responsibility of ensuring that their participation with others increases.

Finally Kunc and Van der Klift (2009) emphasise to the highest degree that inclusion cannot be successful unless it is accompanied with 'a *sense of belonging'*. Kunc himself has cerebral palsy and is a wheelchair user and inclusive education according to him and his partner, is necessary for creating a sense of belonging. A sense of belonging (or a sense of being part of a community) according to Kunc, necessarily results in the accelerated learning of skills. They illustrate this concept by pointing out that a child is usually taught skills in order to be part of community, or to illustrate this graphically:

GRAPHIC 1: TRADITIONAL TEACHING METHOD

Strong proponents of inclusive education, Kunc and van der Klift (ibid) however believe that when a child feels part of the community the learning of skills is far more easily acquired, or as illustration:

GRAPHIC 2: ACCELERATED LEARNING AS A RESULT OF A SENSE OF BELONGING

These ardent advocates of disability believe that Maslow's 'hierarchy of needs' have been partially inverted by the educational system and that children are placed in classes based on their levels of mastery. This practice in turn impedes the development of self-actualisation because they say, self esteem seldom evolves without a sense of belonging. Maslow's 'hierarchy of needs' therefore needs to be revisited so that a sense of belonging is experienced by children *first, before* self esteem can develop (see Appendix B for a further explanation of Kunc's understanding of how Maslow's hierarchy of needs have been partially

inverted). According to Kunc then, inclusive education can only be successful if children experience, first and foremost, a sense of belonging. Membership in a classroom is contingent then on factors other than achievement and in addition, it is a pragmatic way to build youth for a more inclusive future (Kunc, ibid).

As can be seen there are a variety of models for inclusive education and this list is by no means exhaustive. As inclusion is practiced in more schools, more models are likely to emerge in the future. For the purpose of this study I adhere to a view of inclusion that has been influenced by a number of authors (Brown & Shearer, 2004; Kunc, 2009; Meijer, Soriano & Watkins, 2004; Norwich, 2004 amongst others). Firstly, the needs of the child must take precedence as one would in line with soft inclusion (Norwich, 2004). Support would thus be provided in a mainstream setting where and when it is required in order for a child to be equipped for a good 'quality of life' (Brown & Shearer, 2004) as an adult. Secondly, parents should have a choice of services but the overall system should encourage participation in a mainstream one-track (Meijer, Soriano & Watkins, 2004) setting. And thirdly Kunc's (2009) 'sense of belonging' has influenced my own belief that all children not only benefit from being in a mainstream setting, but that it is as they experience a sense of belonging that their learning improves and accelerates.

2.4 INTERROGATING THE KNOWLEDGE BASE ON INCLUSIVE EDUCATION

Why is it that despite the good intentions apparent in WP6 to include *all* children, to educate *all* children, to have equality for *all*, that in practice, not all children are accommodated in our schools? Questions like these intrigue me and therefore underpin the literature review that follows. The literature will hopefully provide the pieces that are necessary for completing the perplexing puzzle surrounding the inclusive education process in South Africa.

2.4.1 DEFINITION OF INCLUSIVE EDUCATION

A trek through the literature reveals that the definition of inclusive education is problematic as it is understood differently in different contexts. From my own experience it is not uncommon to find that both lay people and professionals tend to have a one-dimensional

understanding of what is meant by inclusive education. It is often perceived as not only being a foreign concept, but also an implausible one. Too few educators in my estimation as a practitioner in the field grasp its meaning or its rationale. In support of this statement Armstrong, Lynch and Severin (2005) discovered that in questioning educational practitioners in the Caribbean where inclusive education was being implemented by the government, many of them had never heard of the concept of inclusive education, nor of the more widely-known EFA.

The terminology that characterises the inclusive education debate complicates matters even further. So what then is inclusive education, or more specifically, what is it not? Sands, Kozleski and French (2000) argue that '[i]nclusive school communities are rooted in the philosophy that all children can learn and belong in the mainstream of school and society" (p. 24). These and other authors such as Swart and Pettipher (2005), define inclusive education in terms of school reform that focuses on students rather than on extraneous issues such as instructional practices, personnel issues or subject matters. Allan (1999) concurs with this definition of inclusive education and describes inclusive education as being the "new orthodoxy" (p. 14), one which not only prescribes that the ethos of schools be altered, but also that "all children are included as a right" (ibid). An author such as Paterson (2005) advocates the celebration of diversity and different ways of learning as being a universal remedy for leaving 'no child behind'. According to Booth (2003), inclusive education is an approach that "seeks to address the learning needs of all children, youth and adults with a specific focus on those who are vulnerable to marginalization *[sic]* and exclusion" (p. 4). The Salamanca Statement and Framework for Action on Special Needs Education, paragraph 3, is particularly clear about what inclusive education should entail:

> "…schools should accommodate **all children** *[original emphasi]* regardless of their physical, intellectual, social, emotional, linguistic or other conditions. This should include disabled and gifted children, street and working children, children from remote or nomadic populations, children from linguistic, ethnic or cultural minorities and children from disadvantaged or marginalised areas or groups".

The Dakar Framework for Action (2000) hints at inclusive education as being the scaffolding that will underpin the delivery of basic education to all children and adolescents, a "basic education that assures access, permanence, quality learning and the full participation of all"

(p. 39). Closer to home, the South African DoE has adopted the definition that echoes the South African Constitution which describes inclusive education as being "a learning environment that promotes the full personal, academic and professional development of all learners irrespective of race, class, gender, disability, religion, culture, sexual preference, learning styles and language". In addition, WP6 embodies the themes of individual learning styles, equal education for all learners to learn and succeed, as well as acknowledging that learning can take place outside of schools (see Appendix C for an excerpt from WP6).

Corbett and Slee (2000) define inclusive education as "an unabashed announcement, a public and political declaration and celebration of difference" which "requires continual proactive responsiveness to foster an inclusive educational culture" (p. 55). Ainscow (2005) reiterates the international stance on inclusive education which presumes "to eliminate social exclusion that is a consequence of attitudes and responses to diversity" (p. 109). He argues that inclusive education is "a basic human right and the foundation for a more just society" (ibid). If diversity is to be the norm, and if the system has to change to accommodate all children, words such as 'special' according to Mittler (2000) are "not only anachronistic but discriminatory" (p. 8) and should therefore be discarded in favour of new terminology.

Several caveats that exist in defining inclusive education is highlighted by Soudien and Baxen (2006) who believe that "definitions be understood as emergent from particular histories and discursive formations" (p. 154). Definitions, put differently, are shaped by the prevailing value system which in turn can result in a number of responses that are seldom rational or neutral. Michael Oliver (2004) makes the point that,

> "the success of integration at an ideological level has made it almost impossible for it to be examined critically. Further, while sociology played an important role in the critique of segregation, it has not, as yet, provided a similar critique of integration" (p. 92).

If sociology has failed to be critical about integration or inclusion, it cannot ask the right questions (ibid) and this then in turn, makes the conceptualising of definitions problematic. An important question that sociology needs to ask regarding integration therefore is how it can be achieved in an unequal society (ibid) in the first place.

Clearly, the notion of inclusive education is a complex one. Inclusive education is neither an ideological option, nor is it an add-on (Rice, 2005). It is not about segregation where children are educated in different settings nor is it about integration which is inclusion in name only. Inclusive education is in fact not about disability per se. It is not about the notion of sameness or egalitarianism (Vlachou, 2004), nor is it about equal opportunity. Rather, inclusive education is a call to think differently about education. It is a challenge to the status quo. Inclusive education is the catalyst in bringing about the change that is needed in education across the globe to make education more accessible, participatory and meaningful for *all* students, not just the privileged few who can either afford good education or who have the ability or resilience to adjust to an educational system, inadequate or not. It is not about privileging the few (Kumashiro, 2002).

David Warner (2006) says that "[i]n times of change, learners inherit the earth, while the learned find themselves beautifully equipped for a world that no longer exists". In favouring children with the abilities to 'perform' at a required level, schools hover on the brink of themselves practicing marginalisation. The very place where children should feel safe and nurtured is the place where they invariably face the very real dangers of failure, and in many countries the added dangers of being raped, bullied, on the receiving end of corporal punishment, or of being ridiculed by both children and staff. In a critique of how mainstream schools fail children, Leaf (2005) claims that so-called neurotypical children can actually "develop a classroom-induced learning disability" (p. 71) if their learning is not of a high enough standard. In addition, the provision of safe schooling that provides effective education cannot be underestimated. UNICEF in particular, has recognized how unsafe schools can jeopardize learning and they have therefore developed programmes that address some of the issues that undermine learning (2005). The UNICEF director is quoted as saying that that "[f]or the world's poor children, every day in school is a precious opportunity". Kumashiro (2002) describes some schools as "harmful spaces" rather than "helpful spaces" (p. 24) where the Other is welcomed, educated and their needs are addressed, where "normalcy is not presumed", where they can be assured that their voices are heard and where they are exposed to role models (ibid). The power to provide appropriate education to all children therefore, depends not only on the policymakers but also on the educators who deliver it.

Messiou (2006) describes the complexity of defining inclusion when she says that "marginalization *[sic]* is not easily defined or identified, nor easily tackled. It remains a multifaceted concept, requiring careful examination in relation to particular contexts and times" (p. 53). And lastly, disability is a social construct, the irony being that the environment that 'creates' the construct of disability is itself inadequate. As Vlachou (2005) points out, for education to be more effective it needs to be improved and changed at every level. Individual schools can make a difference to children's lives, but if education as a whole is going to be effective in changing the lives of all children, the change needs to take place at a level that will revolutionise the status quo, not only the school. This is the role of inclusive education and this is the definition of inclusive education that will be used in this thesis. In other words, and as said previously, inclusive education is not a focus on disability, it is instead the panacea for a type of education that will benefit *all* children. It is an acceptance of the fact that all children face problems or barriers at school (Alur, 2002). It is understood as being a system that "is built upon ideals of social justice where participation and success are irrespective of 'race', gender, socio-economic status, ethnicity, age and disability so that disadvantage is not reproduced" (Nunan in Komesaroff, 2005, p. 389). It is the systematic replacement of exclusionary practices with that which values diversity and welcomes difference (Swart & Pettipher, 2005). Bailey's (2004) argument that "inclusion refers to the process of placing students with disabilities and special needs in classrooms with children who do not have such disabilities and needs" (p. 85) holds the kernel for this study. Instead of children being isolated in separate classrooms, where therapies and educational intervention occur in seclusion, the inclusive classroom welcomes new arrangements that purposefully provides for all children. Those who need extra support are given it in the same space by teachers who themselves have the support of specialists. The inclusive school is a restructured school, one that welcomes difference and creates a culture of acceptance. In other words, an inclusive school would use as a yardstick "those values which would be the preferred options for regular pupils" (Hegarty, 2004).

For the purposes of this study therefore, the definition of inclusive education is a broad one that sees inclusive education as being a system that provides for *all* children, one that is not only based on education as a human right but one that also offers solutions to an existent system that continually fails to prepare its students for an ever-changing world (Vlachou,

2004). It is a definition however, that takes into account that "definitions are not neutral constructions that are disembedded from their contexts, but instead are deeply situated and embedded in discourses of corporeality that convey powerful normative messages about what is acceptable and desirable, as against that which is neither" (Soudien & Baxen, 2006, p. 155). For inclusive education to become the norm, society itself and the way in which it views itself, needs therefore to radically change.

2.4.2   INCLUSION AS A BROADER SOCIETAL ISSUE

Values may underpin and shape a society (Alur, 2002) but it is society that dictates how it is to be organised. Not until conferences such as Salamanca and Dakar were traditional exclusionary educational practices questioned and attempts made to reorganise them. It was the norm to actively label, separate and marginalise children according to a bureaucracy who thought they had found the solution for educating children labelled as substandard.

The way in which society in the past has viewed children who did not fit the neurotypical label, has deeply influenced the way in which society has treated their atypical children. Where society may fail their children however, education has the potential of offering life-changing opportunities. Education has the potential of righting many wrongs in the lives of its cohorts. As Vlachou (2005) says, "education is *the* (original emphasis) social context wherein the tension, the dialogue and the politics of the self and others unfold" (p. 18). By being purposefully inclusive, schools value individuals, respect ideas and beliefs, and provide opportunities that circumstances may inhibit.

The *raison d'être* for schools to be inclusive is that the struggle for a more inclusive society be amplified and enhanced (Berhanu, 2005; Hunt et al., 2000; Lawy and Biesta, 2006; Luk, 2005; Rice, 2005; Skrtic, 1996; Vlachou, 2005; and Ypinazar, 2004 amongst others). Armstrong (1999) points out that the schools that are engaged in challenging discriminatory and exclusionary barriers are ultimately contributing to a more inclusive society. Booth (UNESCO, 2003) believes that society is fragmented because more and more people are being excluded from meaningful participation in the economic, social, political and cultural lives of their communities. "Such a society", he says, "is neither efficient nor safe" (p. 3). Booth extends the argument:

"any educational policy must be able to meet the challenges of pluralism and enable everyone to find their place in the community to which they primarily belong and at the same time be given the means to open up to other communities" (p. 5).

O'Brien (2003) speaks of the "social alienation of difference" and describes the degradation that occurs as a result of people being institutionalised in preference to being a part of normal society. Remediating a problem therefore requires the restoration of social connection not only so that a sense of *belonging* is experienced but that 'the *being* in community' is not at "the risk of simulating the harm wrought by institutional living" (p. 29). The point here is that any person who is intentionally marginalised by another is inevitably relegated to an inferior position whether it is in a special school, a prison, a mental institution, an orphanage or a ghetto. These environments encourage "learned helplessness" (Beukelman & Mirenda, 1992; and Skrtic, 1996), and result in a loss of self esteem. They teach less than ideal values, and they perpetuate the power and control of one group over another.

2.4.3   LOCATION OF THE PROBLEM

As mentioned previously, the 'slow march' towards a more inclusive society has been bolstered by a number of movements on an international scale. As a result, the rise of disability studies, especially since the 1980s (Longmore & Umansky, 2001), has contributed towards the knowledge base concerning people with disabilities (Priestly, 2006) as it highlights the issues this population encounter. In addition, legislation and activism have given status to, and legitimised, disability studies as a "sociopolitical" construct or "minority-group" model (Longmore & Umansky, 2001, p. 12). Many authors (for example see Longmore & Umansky, 2001 and Watermeyer, Swartz, Lorenzo Schneider & Priestley, 2006) allude to the fact that the medical model of disability is an inadequate model as far as "explaining or addressing the social marginalisation and economic deprivation of many people with disabilities" (Longmore & Umansky, 2001, p. 12) is concerned. Since the 1990s, "[h]umanistic disability studies has rapidly developed as a vibrant area of inquiry *[sic]*" (ibid, p. 13). The result of this phenomenon is that disability studies not only "goes beyond

cataloguing discrimination and arguing for social change" (Linton, as cited in Longmore & Umansky, 2001, p. 13) it also,

> "deepens the understanding of gender and sexuality, individualism and equality, minority group definitions, autonomy, wholeness, independence, dependence, health, physical appearance, aesthetics, the integrity of the body, community, and notions of progress and perfection that pervade every aspect of the civic and pedagogic cultures" (ibid, p. 13-14).

At best disability studies investigates basic epistemological issues that are in fact the bedrock of *all* intellectual enquiry (ibid). It plays a similar role to queer legal theory which also raises issues other than sexual matters.

> "Queer legal theory can be positioned as a race-inclusive enterprise, a class-inclusive enterprise, a sex-inclusive enterprise, and a gender-inclusive enterprise, as well as a sexual-orientation enterprise...Queer legal theory must connote an activist and egalitarian sense of *resistance to all forms of subordination* [*original emphasis*]" (Valdes, 1995, as cited by Lugg, 2006, p. 180).

In a similar vein, Mittler (2000) declares that world-wide, groups have become concerned with discriminatory practices within societies and he particularly refers to the disability movement in the UK which has a comprehensive agenda that includes,

- "the passing and enforcement of anti-discrimination legislation;
- The abolition of laws and regulations that permit segregation and restrict access to goods, services and ordinary entitlements available to other citizens;
- Campaign to increase public awareness of the rights and responsibilities of disabled persons; and,
- Involvement of disabled persons and their chosen representatives in all decisions relevant to their full and equal participation in society" (p. 6).

It is a world-wide trend then that groups are becoming more concerned and increasingly vocal about discriminatory practices even to the extent of speaking out about genetic engineering "which raises issues about 'designer babies' and the elimination of 'imperfect foetuses'" (Rioux & Bach in Mittler, 2000, p. 6).

In addition, it has been noted that disability history is not unlike the history of people of colour or women (Longmore & Umansky, 2001) in that it is conspicuous by its absence. It becomes imperative therefore that every effort is made to 'look under the carpet' of mainstream history in order to document the history of discriminatory practices against people with disabilities. This needs to be done not only to learn from the past and but also to right the wrongs of unfair and divisive practices for it could be said that the only constant in life is 'history'. Cultural and social assumptions should be examined and the social arrangements that shape disability (Brockley, 2001) should be understood. The erroneous belief that disability is 'situated' within an individual needs to be exposed for what it is and should rather be understood as being "a social problem caused by social processes" (Priestly, 2006, p. 21).

Until we understand that history has been shaped by philosophies such as Plato's whose view was that there are natural inequalities among people (ibid) or Aristotle's belief that the nature of one's body determined the state of one's soul (ibid) or the evolutionary concept that "normality was *[sic]* intimately connected to the western notion of progress" (Baynton, 2001, p. 36), we as humans will continue to marginalise people along lines of race, sex, gender, sexual orientation and ability. By locating the source of a problem within an individual, we justify "social inequalities on the basis of biological inequalities" (Vlachou, 2005, p. 6). Such actions are not only undesirable in terms of celebrating differences but are also counter-productive to a community being more inclusive. Furthermore, it is a denial of the positive contribution that people with disabilities make to the health and well-being of a society.

Even though it is common practice throughout the world, the use of the medical model that locates an impairment or disability within an individual has serious consequences. In many countries, individuals with disabilities are stereotyped and constructed as being pitiable, unhappy or bitter (Kenny & Shevlin, 2001). Graham (2006) argues that when schools focus on individual deficits it "not only has negative effects upon teacher perceptions of such students, but also deters schools from interrogating the efficacy and equity of curriculum, school structure and pedagogic practice". Labelling children, constructing categories and descriptions of disorders, serves only "to provide the human sciences with a locatable object of scrutiny" (Graham, 2006). By doing this, we effectively take the attention away from our

own prejudices and biases, or conversely, as Watermeyer (2006) claims, we try either to obliterate the disability or resort to seeing individuals with disabilities as welfare or charity cases.

Coulson, Napier and Matsebe (2006) suggest that it is the medical model that prevents individuals with disabilities from fully participating in social change. Furthermore, they along with other authors (for example Schneider, 2006) emphasise how the environment and attitudes not only create barriers for those with disabilities, but exacerbate and even create disability. Another problem with the medical model is that it describes disability as a disease, something that needs fixing. This practice effectively takes the focus away from the environment (that effectively needs to change) and instead puts the focus squarely on the impairment (K & Duncan, 2006). McDougall (2006) claims that by locating a problem within a person not only ultimately results in a "secondary handicap" (p. 394) of oppression, but also results in seeing "people with disabilities in terms of their bodies alone" (ibid). This practice either means that appropriate educational interventions are ignored in favour of treating the bodily impairment or that those with disabilities are thought of as being a homogenous group of people. Another corollary of this practice is that 'impairments' such as autism, mental illness or epilepsy that are not obvious, are made to be invisible and effectively silenced by the simple 'removal' of these people from society (ibid).

For the sake of this study, the underlying assumption is a rejection of the medical model of disability. Instead, I agree with Bailey (2004) who argues that children should be described in different terms, terms that draw one away from the internal problem and more towards the amount of support the individual requires. This will be done because as Bailey (2004) points out, functional descriptions of achievement levels "divert attention from the typical stereotype of disabled people" (p. 78) and at the same time offer pointers for appropriate intervention strategies. A caveat of describing children in terms of achievement or non achievement levels could however have yet another unintended outcome, one even more negative that was originally anticipated. So whereas, the intervention might be shaped by the "achievement" or "non achievement" level, the label so given, might only further serve to stigmatise. The underlying assumption therefore embodies the belief that each child is unique and is seen in terms of his or her own capabilities and strengths.

2.4.4 IDENTITY AND LEARNING

According to Berhanu (2005), identity is not only related to a feeling of attachment based on participation in a group but also to "a feeling of being well anchored within a broader social framework in which culturally embedded meanings, values and metacommunication each play significant roles" (p. 62) It has been well documented that one's self esteem is directly related to how much one is able to learn (Berhanu, 2005). A school that marginalises students could be described as being an unhealthy environment for its cohorts because as one author believes, "if a child fails, the failure is not by the child but by the school" (Vlachou, 2004, p. 7).

Clearly children who attend separate schools are limited in experiencing fulfilment in the broader sense simply because as outsiders, they are not afforded the same opportunities as their neurotypical counterparts to participate in the larger social milieu. Furthermore, children absorb and believe what they are taught (Jansen, 2006). Educating children in separate settings then will inevitably result in them internalising the 'truth' that they are deficient in some way (Graham, 2006). It is only when one forages through the literature (Allan, 1999; Armstrong, Lynch & Severin, 2005; Berhanu, 2005; Booth, 2003; Evans & Lunt, 2002; Skrtic, 1996; and Ypinazar & Pagliano, 2004; etc.) that one comes face to face with research that emphasises that the school system as it stands is deficient and ineffective and that the penalty of marginalising children has economic, social, political and individual consequences. Kunc (2009) is quite clear that children cannot learn if they do not experience a sense of belonging *first.*

2.4.5 PROBLEMATISING NORMALISATION AND DEVIANCE

The norm, according to Graham (2006), is a fiction which negates diversity. She believes that schooling as a field of application "both produces and perpetuates the norm as a grid of intelligibility" (p. 8) and claims that "measurement is a game of averages, but a game that constructs winners and losers" (ibid). In an effort to counteract the game of 'winning and losing' some schools have opted to provide 'equal opportunities' to their students. The problem is that the provision of equal opportunities create new kinds of 'winners and losers'. Students therefore do not necessarily benefit from equal opportunities because

when they have equal opportunities 'imposed' on them and they cannot cope, the problem is seen as being theirs and not the system's. Similarly assessing a child according to 'normal' developmental stages can be problematic because any child who does not 'fit the mould' faces the danger of being given a stigmatising label. Graham (2006) in quoting Foucault, believes that children who do not fit in the neurotypical developmental model are seen as having 'a lack', in need of remediation or a cure. In McDougall's words (2006), the 'lack' is a "signifier" (p. 398) of disability and could refer to any number of areas such as a physical lack, a lack of life chances, of opportunity or even of humanity. Graham (ibid) extends Foucault's thinking when she concludes that these children then become subjected to an "uninterrupted play of calculated gazes" and a type of "branding" (p. 7) that depersonalises them.

Normalisation needs therefore to be rethought. Normalisation is too often about the dominant culture and not enough about rights and values (Vlachou, 1997). It is too often about oppressing people with disabilities and denying them their experiences and differences, and not enough about the critical examination of the damaging effects of treating them as 'normal'. In response to the denial of personal experience, Morris, a writer with a physical disability, claims:

> "If we deny this we will find that our personal experience of disability will remain an isolated one; we will experience our differences as something peculiar to us as individuals – and we will commonly feel a sense of personal blame and responsibility" (Vlachou, 1997, p. 23).

In apposition, normalisation is not to be confused with the desire for 'normality'. In their study of young people with disabilities, Kenny and Shevlin (2001) found that young people desired "normal access and inclusion in all aspects of school life" (p. 105). They reported how these young people ran into systemic inadequacies when they tried to access the curriculum or when they tried to interact with their teachers and peers because they had already been labelled as 'Other' by the very people who they should have been able to trust. To counteract the prejudices of the dominant culture several changes need to occur. The experiences of students must be taken into account, the unfamiliar needs to be made familiar (Ainscow, 2005), the advocacy of parents needs to encouraged, systemic change

needs to take place both at school level and at the broader societal level and most importantly, what children experience must be given voice.

2.4.6   VOICES FALLING ON DEAF EARS

So how often do we listen to our children, especially our children with cognitive difficulties or with little or no functional speech at all, and what are the consequences of *not* listening to them? By not listening, we effectively silence them. Creating silent spaces is easy. Kozol (2005) illustrates in his research how a Bronx school introduced not only silent lunches but also used silent recesses as a punishment. In addition, the teachers used a hand signal in class for "zero noise, active listening, heads up, eyes like tractor beams!" (p. 6). The expected result was that students would not show any spontaneous emotion at all. This illustration might be extreme, but unless there is a concerted effort to encourage students to articulate their feelings, we unwittingly play a part in silencing them. In their recommendations for school safety, the US secret service suggest that schools adopt "a strong, but caring stance against the code of silence" (Kunc, 2009), this in response to recent fatal attacks at schools by students on students. Educators need therefore to be aware of the power they have over children in the confines of their own classrooms. It is an educator's choice to either overlook children and so effectively 'silence' them, or to empower them by creating opportunities for them to participate by speaking out.

"My favourite colour is six" is the answer I got from a ten year old girl in my class one day. I had been asking the children what their favourite colour was and when it came to her turn, she knew she was required to give an 'answer', became flustered, and so blurted out the first thing that popped into her head. I had two choices in my response. I could have scolded her for not listening, for day dreaming or for being naughty, or I could have understood where she was coming from and see the humour in it. I *chose* to do the latter for several reasons. Firstly, I was intrigued by the possibilities of a number being associated with a particular colour[5], and secondly, I realised that maybe the only reason she did not give a 'correct' answer was because for some inexplicable reason, she was unable to adequately process the information. Whatever the reason, it simply did not matter that she gave me an answer that did not make sense. What mattered was that she responded to a question and was allowed to feel that she had contributed to a situation without being made to feel as if

she was being laughed at. She might not have given a 'correct' answer, but a moment of 'social closeness' (Beukelman & Mirenda, 1992) was unexpectedly created and enjoyed by all in close proximity.

Ignoring the voices of marginalised children is tantamount to neglect. In her research, Messiou (2006) found that marginalisation deeply affects children. The group of marginalised children with whom she worked spoke of feelings of anger, humiliation, powerlessness, helplessness, loneliness, emptiness and pain. In her study of the 'unfamiliar voices' of children with intellectual disabilities, Snelgrove (2005) established that the descriptions of their feelings amounted to being 'bad, mad and sad'. Likewise Komesaroff (2005) found that deaf students at a mainstream university who were made to feel the centre of attention because of insensitive remarks by lecturers or who did not have interpreters available to them, ended up feeling isolated and oppressed. In the light of these feelings, Messiou (2006) and others believe that "children's voices must be heard in order to make apparent possible ways of viewing marginalization *[sic]*" (p. 53). In addition, Skrtic (1996) sees voice as a tool of empowerment and self determination and he is convinced that "reform of education seeks an adaptable system in which teachers collaborate among themselves *and* [*emphasis mine*] with their consumers to personalize *[sic]* instructional practices" (p. 150). Lastly, Thomas and Loxley (2001) quote Lyotard who believes that "every 'voice' should be treated as legitimate, and as worth of respect as every other" (p. 79). It is clear that the voices of the disempowered need to be taken seriously and that policy should be shaped by their views otherwise difference will remain in place as "division" (Williams as cited in Thomas & Loxley, 2001, p. 84) rather than diversity.

Adults with a variety of disabilities are known to struggle for their rights because authorities seldom understand the needs of their clients with disabilities. Vlachou (2005) points out the importance of giving people control over their lives. She, as well as Cook, Swain and French (2001), advocate that people with disabilities should be actively given voice by involving them in the decision-making processes for policies that affect their lives since they are the authorities of their own needs. Putman (2005) reports that adults with disabilities "thought that prejudicial attitudes and policies toward disability were more of a problem for them than their own impairments" (p. 190). Krahn, Putman, Drum and Powers (2006) report that people with disabilities have "higher levels of depression, and lower levels of support" (p.

18) than those without disabilities. Kenny and Shevlin (2001) suggest that the arrival of a minority group such as individuals with disabilities into mainstream society challenges the natural order. Very often the reaction of society to individuals with disabilities is one of fear because when confronted with difference, society is "caught off balance" (Watermeyer, 2006). Interactions with those with disabilities have also been described as being "sticky" (Watermeyer, 2006) and it is this 'stickiness' that does the damage because the assumption is that the problem lies within individuals with disabilities rather than within the natural order. As Kunc (2009) succinctly puts it, "children with disabilities scare the hell out of teachers". This attitude could be extended to the generalised response of mainstream society towards anyone with a disability.

A further indictment of the existing system is that even individuals with disabilities often accept the status quo as being acceptable and normal. By continually having to ask for help and to inform others of their needs puts an extra strain on people who already have their own daily struggles. Armstrong, Dolinski and Wrapson (1999) found that by including the student they were studying as a co-author in their research, they mutually empowered themselves "in a common struggle against our common oppression through our joint engagement in the process of critique" (p. 35). In other words in studying one person's experience of exclusion, they found that they came face to face not only with their own practices of socially excluding others, a phenomenon which is common to most people, but also with the struggle for a more just society.

Children whose experiences reflect a preference for segregated schooling is cause for concern as it is an indication that mainstream schools fail them. One of the conclusions that Cook, Swain and French (2001) came to in their research with students who were moved from segregated schools to mainstream schools was that although the experience was traumatic and difficult for them, inclusion in the end provided a "powerful dimension of belonging" (p. 309). They, along with many other authors, urge that research into inclusive education must include the voices of individuals with disabilities. What needs to be kept in mind however is that simply talking to individuals with disabilities, and more particularly to those who have cognitive disabilities, "does not constitute engagement with the disempowered 'other'" (Snelgrove, 2005, p. 319). By talking to people, and in this case, to children with disabilities, not only leads to a greater awareness of the concerns of people

with disabilities as participants, but also to a "sensitivity to the worth of the children's experiences" (Snelgrove, ibid). By listening, we open a space where children, not only children with disabilities, are given the opportunity to participate as active agents in the inclusion conundrum. What will interest me in my study therefore is whether principals do anything about finding out what the students with disabilities experience, think or feel, and once they have this knowledge, what they do with it.

In addition to listening to the voices of children, researchers emphasise the importance of listening to the voices of teachers in the inclusionary process. Scruggs and Mastropieri (2004) refer to a survey done by Horne (1983) who found that school administrators were the most optimistic about inclusion whereas teachers were the most pessimistic. Their conclusion is that "the voices of those who will bear the responsibilities should also be heard as intensified mainstreaming and inclusion policies are being planned" (p. 396).

And lastly, Shields (2003) argues that schools should actively find new ways for children to communicate, they need to encourage children to talk about their own prejudices as well as social norms and the way in which they behave towards others. As Kunc (2009) quoted during a recent seminar in South Africa, "a riot is the language of the unheard" (said by Martin Luther King in 1963)[6].

2.4.7 EXPLORING OTHERNESS

The literature is laden with opinions about people seen as being "other" (for example Fine, 2000; Graham, 2006; Komesaroff, 2005; Taylor; 2005; Soudien & Baxen, 2006 and Watermeyer, 2006). Society is characterised by groupings, by exclusions, by relegations of one group by another. In addition, the complexity of the social order deepens when certain groups for their own reasons, choose to exclude themselves. The type of exclusion that concerns this thesis however, are the decisions that are unilaterally made by mainstream society in choosing who should be included and who should be excluded.

Historically, our educational system developed along the lines of the imported "ambivalence" of the "colonial stereotype" (Bhabha, 1994, p. 95). According to Bhabha, it is this "force of ambivalence that gives the colonial stereotype its currency: ensures its

repeatability in changing historical and discursive conjunctures; informs its strategies of individuation and marginalization *[sic]"* (ibid). Taking up the challenge to become a global player comes with a price. It is where the typecasting of some as 'Other' begins. Graham (2006) in her examination of children with ADHD and behavioural problems, concludes that it is the "manifestation of otherness" that dictates where they will be educated. She continues by pointing out that children seen as 'Other' simply do not fit within the narrow confines of the existing institutions and thereby are disqualified from receiving the services they require (p. 428). She describes the setting up of 'Others' as an unequal relationship, that it is convenient for society to push to the periphery anyone who is viewed as a threat to the status quo. Some children are seen as burdens to society and are ridiculed (Armstrong, 1999). By stigmatising them, some children are ironically made to be "vividly visible" while those who belong to a non-stigmatised group become "curiously absent" (Ypinazar, 2004 , p. 434). In addition, Kumashiro (2002) makes the point that the knowledge of the Other is either incomplete or distorted through exposure to a biased media or to an informal curriculum or "hidden" curriculum (Jackson, 1968, as cited by Kumashiro, 2002) "which means that, because hidden curricula are taught indirectly, pervasively, and often unintentionally, they carry more educational significance than the official curriculum (ibid, p. 40). In this way children learn that is acceptable to exclude.

In some cultures, silence is sometimes enigmatically self imposed for cultural reasons (Berhanu, 2005). The concern though is for children who cannot speak up for themselves, for children who have been born without the cognitive ability to reason for themselves or to create a discourse that might shape their lives. Although programmes may exist to meet the needs of these children, they function outside of the mainstream and can thus not be guaranteed full participation (Booth, 2003). Invariably, children who receive segregated schooling are being set up to be excluded from their social communities as adults. Furthermore, Messiou (2006) describes how social boundaries are determined by notions of normality and hence are likely to change from one setting to another. Since boundaries are arbitrary and not easily defined, members of a society should have the choice of when they wish to cross these boundaries. Children who are deliberately marginalised are denied this autonomy. They have no choice but to remain on the outside. In addition, their position on the outside is very often legitimised by the way they are treated by schools, by government and perhaps not as often, by their own families and communities. As Foucault (2003) says,

minority groups are seldom full citizens, for they only live "grafted" on to society (p. 239), aliens in their own world. This might not be true for people who choose to be part of a minority group but it is certainly true for children who do not have the capacity to carve out their own identities in society. On a different note, Virginia Woolf, a trenchant feminist, called for women to refuse to go along with male subjugation and patriotism and to counteract this phenomenon by forming a "Society of Outsiders" (Briggs, 2005, p. 322) which took the stance of deliberately standing against what she interpreted as being a fascist state of being. This stand, however desirable it may be to bring about societal change, is just not possible for children with cognitive disabilities. Empowering students to create their own solutions to problems is therefore a point to be considered by schools and principals.

2.4.8   PRINCIPALS AS AGENTS OF CHANGE

It is fitting at this point to discuss the role that principals can play in bringing about more inclusive schools. As pointed out earlier, many authors such as Angelides (2004), Daane et al. (2001), Hunt et al. (2000), Palley (2006) and Taylor (2005) note that there is much evidence to prove that school success is determined by a strong and motivated leader. It will take nothing less than a "pioneering principal" (Tye, 2000) to adopt and implement inclusive education into an individual school for it is no easy task to introduce a new phenomenon into a school (Smulyan, 2000). Teachers who are already hard-pressed are seldom open to new ideas and for this reason, a visionary (Lindsay, 2004, and Swart & Pettipher, 2005) and courageous leader is required to lead the process. In the words of Mr Mothlabane, a principal in the Eastern Cape, who participated in research done by researchers from the University of Fort Hare to measure school transformation in a very deprived rural context said, after the prescribed intervention was implemented, "there was a lot we had to learn…the idea that transformation begins with me…you know…*I am a change agent*" [*emphasis mine*] (Lawrence, 2007, p. 35). According to Palestini (2003), if leaders are open to positive change, not change for the sake of change, but change that keep an institution healthy, "change will come to be expected" (p. 98) or as he advises leaders, "be the change that you expect in others" (p. 99).

Palestini (ibid) explores Ignatian principles for developing an effective leadership style that is essentially care- and value-based and which focuses on being the "one who serves". Palestini

(ibid) claims that the education system does not serve our young people well and nor does it "allow for individual differences" (p. 147). He exhorts leaders therefore to consider the five Ignatian principles in order to become the kinds of leaders that remain aware of those around them and who remain open to change. The *first* of the five principles includes the concept of *magis* or "more". Ignatius was never satisfied with the status quo and continually sought ways to 'perfect' his "personal, spiritual and professional life" (p. 40). This quest to continually improve oneself in all spheres of one's life, to become discontent with mediocrity, embodies the concept of change as a way of life. Ignatius's followers do not see frontiers and boundaries as obstacles or ends, rather they see them as "new challenges to be faced, new opportunities to be welcomed" (p. 41). Living out this principle will equip a leader to find a better alternative to dilemmas. Living by this principle ensures that one focuses on the humanity of others and of taking actions that will reduce the dehumanisation of others. It is an expression of a deep love and a reverence for humanity. The *second* principle is one of enquiry and discernment of the status quo in particular. Enquiry and discernment assist a leader to decide which "horn of dilemma" should come down (p. 42) and that the "ideal disposition for inquiry *[sic]* and discernment is humility" (ibid) or in other words, "when the greatest good cannot readily be determined, the greater good is more easily discerned in the position of humility" (ibid). More will be said about dilemmas in the next section. Ignatius said that it is the responsibility of the individual to make choices that benefit the underserved and the marginalised. The *third* principle that applies to leaders is the *cura personalis* or "care of the person" (p. 43). In a leadership position this would mean that others become active participants rather than passive recipients. The *fourth* principle is a concept of service and of developing "men and women for others" (ibid). It means teaching others to serve in their communities, to share resources, to become immersed in other cultures, teaching them to force themselves out of their comfort zones by dealing with the gritty realities of people who share their communities with them. In Palenstini's (ibid) words, "[i]t also connects students' textbooks to human reality, and their minds and hearts to values and action" (p. 44-45). By being involved in the lives of others, students discover who they are and who they want to be and teachers become witness to the changes in their lives. Another implication of this principle for leaders in addition to teaching others how to live, is that they act as servant leaders, and "[s]ervant leaders do not inflict pain, they bear pain" (p. 45). The *fifth* Ignatian principle is about social justice and of "solidarity with the poor" (p. 47) which in broad terms means not only identifying with the undeserved, the

marginalised, the oppressed, the "poor in spirit" (ibid) and the emotionally and psychologically poor, but also taking action to bring to an end "inequality, oppression, and injustice" (ibid). It means not perpetuating the hegemony nor rendering minorities as being powerless. Principals therefore can improve their leadership styles by adhering to the five Ignatian principles.

In this next section I examine the role of women principals in education. Several authors such as Coleman (2003) and Cole (2000) point out that the number of woman* principals in schools has increased by a steady percentage in recent years. In 1988 for instance, 5.5% of principals in the UK were women but by 1997 this number had increased to 17% (Cole, 2000). The increase in the number of female principals has been most keenly felt in the primary sector (in the UK) where, by 2002, 62% of principals were women (Coleman, 2003).This phenomenon is a refreshing challenge to male orthodoxy (ibid), the implications being that leadership is becoming more differentiated and more feminised. Cole (2000) uses a study done by O'Leary and Ryan in 1994 to demonstrate her point that deep "institutional change would be possible if women occupied a greater proportion of corporate director and management jobs" (p. 204). If this were true, then it can be argued that women principals or at least a more feminised approach, is more likely to bring about the social changes that are needed for schools to be more inclusive. This would bear out Coleman's (2002) research of transformational leadership in which she found that although both men and women principals opted for an "androgynous" style of leadership, this leadership was characterised by being more "feminine" than "masculine" (p. 31). The qualities that both sets of principals chose to describe themselves in Coleman's research, came more from a feminine paradigm than a male paradigm, and these included awareness of individual differences, a caring attitude, intuitiveness, tolerance, creativity and informality. Fewer principals of both sexes chose qualities from the more male paradigm such as being evaluative, disciplined, competitive and objective. The point here is that for education to be more inclusive, it will likely require a more feminine approach than a masculine one.

Finally, Smulyan (2000) makes the point that because of their gender, women administrators are positioned, it seems, as an "aberration" or as an "outsider within" (p. 597) which may

*I am not specifically focusing on gender issues in this thesis but have added this point in as a matter of interest.

qualify them "to question, challenge, and at times create changes not attempted by others" (ibid). In her research, Smulyan found that out of the three non feminist principals she studied over the period of a year, two of them brought about change in their schools (encouraging diversity and thereby changing the school ethos and the dismissal of an incompetent teacher) which Smulyan attributed to "their strong beliefs about equity and the centrality of the lives of children in their work" (ibid). She discovered however, that the principals she studied "found it difficult to generalize *[sic]* from their own examples of discrimination or conflict" (p. 599). Because of this difficulty to generalise, Smulyan concludes that instead of taking an activist stance to bring about change, non feminist women may opt to develop individual solutions to inequalities. It could then be said that for women principals to bring about change, they need to learn from their own oppressions and to collectively be activists in order to change inequalities.

2.4.9   THE BIAS OF THE EDUCATIONAL CHANGE LITERATURE

Trying to develop a new paradigm in the face of tradition and centuries of exclusionary practices, is a major challenge facing society and schools. The transformation process is complex, and as Fullan (2001) argues, the complexity of change is characterised by fragmentation and incoherence. Change is neither linear, nor simple, but it is inevitable. It seems to be the case though that transformation is the prerogative of individual schools and that it is quite a separate issue from the changes that need to be made if schools en masse are to be more inclusive. A scan through the literature on mainstream educational change (for example the volumes on educational change by Hargreaves, Lieberman, Fullan & Hopkins, 1998) reveals many and varied themes but very little has been written about inclusive education as an imperative for broader educational change. For instance, of the 67 articles that were published in the two-volumed International Handbook of Educational Change (1998), not one of them deals specifically with inclusive education and there are only six references to EFA and inclusion in the 1338 page volume. These aforementioned references do not stand on their own but are embedded in articles dealing with other mainstream themes such as curriculum reform, school evaluation and improvement, teaching standards or teacher education. It appears then that the literature on inclusive education shares the same space as special schools in the educational milieu, that is, it is 'detached' from the literature on mainstream educational change. In my own experience,

inclusive education is often viewed with trepidation and is seen as being the 'pet theory' of a few well-intentioned individuals.

It is only when one reads the literature (Fullan, 1998; Miles, 1998; Tye, 2000) that one sees the potential for common themes to emerge that will benefit educational change in both the mainstream and special education sectors. For instance, in Miles's article (1998) on "Finding Keys to School Change" (p. 37) in the International Handbook of Education al Change, he refers to a number of techniques that could be of relevance to the changes that need to made if education is to be more inclusive. Some of these techniques echo advocates for more inclusive education and include: training principals and teachers differently, in this case training them for co-operative learning and as change agents; introducing temporary systems for innovative short term accomplishments; teaching organisational self reliance; encouraging knowledge transfer, capacity building and networking; creating new schools; supporting implementation; restructuring schools at a national level; and effectively managing systemic reform on a large scale.

On a slightly different note, the written word influences and shapes the thought patterns of its readers. In her study of a related subject, in this case textbooks, Rice (2005) concurs that textbooks are seen as "legitimate material" (p. 407) because they "signify constructions of reality" (ibid) and because they "provide selected access to ideas, information and practices that are interpreted by students as natural, fixed and inevitable" (ibid). To this end I conclude that principals implementing inclusive education are guided by the mainstream literature in their quest for inclusive schools which might not necessarily result in informed opinions.

2.4.10   FEMINIST RESEARCH

I am writing as a feminist researcher and my reason for choosing to do so is related to and intertwined with disability studies in a notable way. Priestley (2006) claims that it is recognised that people with disabilities are "an oppressed and disadvantaged group within society" (p. 23). In addition, disability history, like the history of women and people of colour, is, as mentioned previously, conspicuous by its absence (Longmore & Umansky, 2001). Just as these authors have noted that "women's absence from history reflected the

fact and the nature of their disempowerment" (ibid, p. 15) so they noted too that by the 1980s, women's history had been brought from "the margin to the center *[sic]"* (Scott in Longmore & Umansky, 2001, p. 16) of historiography. Scott, in Longmore and Umansky (ibid), argues that instead of seeing women's history as a subtopic of mainstream history, gender should be considered "as a principal constituent factor of all historical analysis" (ibid, p. 16). In the same way Longmore and Umansky, (ibid) suggest that historians substitute "gender" with "disability" in order to understand "the complex meanings of disability as a personal and group identity, a cultural signifier, and a theoretical paradigm" (ibid, p. 16).

To take the argument even further, at the turn of the nineteenth century "women were said to be less evolved than men" (Baynton, 2001, p. 41) and they were thus 'disabled' as a result of "lesser evolutionary development" (ibid). The disability argument was even used in opposition to women's suffrage to discourage them from participating on an equal footing with men in the political realm. It was believed that "women had disabilities that made them incapable of using the franchise responsibly, and that because of their frailty women would become disabled if exposed to the rigors of political participation" (ibid, p. 42). According to Baynton (ibid) a learned gentleman by the name of Dr Edward Clarke took the argument against educating women to new heights when he claimed that education in fact makes women physically ill, hysterical and "nerve-sick" while a second doctor claimed that education dwarfed and deformed a woman's reproductive organs. Just as the medical model has shaped the way society reacts to disability throughout the ages, the vestiges of how women were perceived a century ago are still evident today in the way that women continue to live with inequalities and gender discrimination specially "in the waged and domestic labour forces" (Arnot, 1994, p. 85). It is interesting to note that disability was also used to justify slavery (Baynton, 2001) and ethnicity (ibid) when the American immigration policy at the end of the nineteenth century was used to exclude people with abnormalities and disabilities (ibid) from entry to America because they were seen as being "undesirable" (ibid, p. 45). The 'abnormalities' were liberally applied to a number of medical conditions such as asthma, bunions, deafness, epilepsy, flat feet, poor eyesight, varicose veins as well as a variety of mental conditions and, of course, homosexuality (ibid) which effectively prevented those seeking entry into the USA from ever gaining admission to another country. Donovan (2004) too quotes a Californian law that until recently still granted maternity leave to women who are 'disabled' by pregnancy (p. 208) while Arneil (1999) refers to a Canadian law

that at the beginning of the twentieth century questioned whether women were in fact 'persons' at all. The point is that disability issues need to gain momentum in history where the peculiarities around exclusions from schools become as absurd as the way in which women were viewed previously.

People with disabilities, like women, need to embrace opportunities to change their own lives and to challenge the "dehumanizing *[sic]* exploitation of a wrongly organized *[sic]* society" (Dill, 1994, p. 44). Dill (ibid), on speaking of women, believes that "[t]hrough joint work on specific issues, we may come to a better understanding of one another's needs and perceptions and begin to overcome some of the suspicions and mistrust that continue to haunt us" (p. 53). Feminists have already been down a path that could have valuable lessons for people with disabilities.

In addition, women are rightful citizens along with men (Donovan, 2001) and each has an inherent "spark of reason" (p. 25) which allows both to develop intellectually and spiritually without reliance on one another (ibid). The same, of course, would apply to all of humanity, disabled or not, and all should be provided with opportunities to encounter true knowledge which "can only be achieved by the individual in direct contact with reality" (ibid, p. 27). Put differently, children with disabilities who are not offered education along with their peers will not encounter true knowledge and will be impeded intellectually and spiritually. Donovan quotes Dunbar who makes the point that subjugation of one by another is a "social disease" (p. 156) and a political relationship. Feminism then is about seeing and doing things differently, about changing a "left-handed" (Ibid, p. 184) humanity, and it thus echoes the proponents of inclusive education who too strive to do things in differently, who strive to stop "the people with the slightly larger muscles" from "bullying the people with the slightly smaller muscles" (Rorty as cited by Donovan, p. 185) whether these be physical or mental "muscles".

Lastly, as a female researcher and writer I wish to echo the words of Donovan for they describe my position in this thesis. She says,

> "A substantial body of evidence has been produced that suggests that women's judgements are based on a fundamental respect for the contingent order, for the environmental context, for the concrete, everyday world. Women more than men

appear to be willing to adopt a passive mode of accepting the diversity of environmental "voices" and the validity of their realities. Women appear less willing to wrench that context apart or to impose upon it alien abstractions or to use implements that subdue it intellectually or physically. Such an epistemology provides the basis for an ethic that is non-imperialistic, that is life-affirming, and that reverences the concrete details of life" (p. 185)

Critics of my stance may say that by advocating inclusive education I am "imposing" a structure on a society that is not ready for it. There is in my understanding however, nothing "alien" about equality, about inclusiveness, about respect and about reverence for human life.

2.5   SUMMARISING THE LITERATURE ON INCLUSIVE EDUCATION

The review of the literature demonstrates the complexity of the process and of the inequalities that pervade every sector of society, not only in schools. For the purposes of this study then, this literature review provides the scaffolding for investigating and analysing the understanding of inclusive education in South Africa. Firstly, the literature review dissects the imperative for inclusive education in a developing country; secondly, it examines the effects of including children into an existing mainstream school system. Thirdly, the definition of 'inclusive education' and 'disability' is thoroughly investigated, and fourthly, the findings will describe and explain the understanding of inclusive education by principals. Each of these themes will be interrogated for the bearing they may have on the implementation of effective and meaningful inclusive education in South Africa.

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Chapter 3
Explaining the methodology

3.1   INTRODUCTION

This chapter deals with the methodology that was engaged to analyse this study. Firstly, the borrowed conceptual framework which consists of three matrices is outlined and explained. The research design is then clarified along with the research aim, the research paradigm and the research methodology. The methodology in turn has several components which are embroidered upon and these include the data collection methods and the details concerning the individual interviews and the direct observations. The approach to the collection of the data is described, as is the research journal. The data analysis is discussed and the validation strategies are mentioned. Finally, the limitations of the study are touched upon and the importance of the ethical considerations are highlighted.

3.2   CONCEPTUAL FRAMEWORK

The themes that emerged from this literature review formed the conceptual framework that were used to analyse the data that surfaced from the research. The importance of providing children with an appropriate education system is emphasised by Wedell (2005) who believes that students who are vulnerable "depend on the efficacy of education for their progress" (p. 4) unlike more capable students who are able to rely on their own resources to counteract inadequacies in the system. In order to analyse the data in more depth, I used aspects of three matrices designed by Wedell (2005), to throw light onto the difficulties that characterise the implementation of inclusive education:

•   **Matrix One (see Figure 1)**
Matrix one "provides the framework for discussing a number of the rigidities emerging from the education structures" (ibid). Some of the rigidities that impact on inclusive education according to Wedell (ibid) include a number of topics such as: funding issues; problems associated with transitions from primary to secondary school; national education policies that conflict with one another or that differ from practice; inflexible timetables and staffing;

the dichotomy that is created by schools trying to be inclusive *and* produce better academic results at the same time; the way children are grouped within schools; conventional teaching methods; and curriculum and assessment specifications. The challenge was to pinpoint the rigidities in the schools I studied to ascertain what hindered or enhanced the inclusive processes in those particular settings.

FIGURE 1: **MATRIX ONE – CURRICULAR AND ASSESSMENT SPECIFICATIONS (ADAPTED FROM WEDELL, 2005)**

CURRICULAR AND ASSESSMENT SPECIFICATIONS
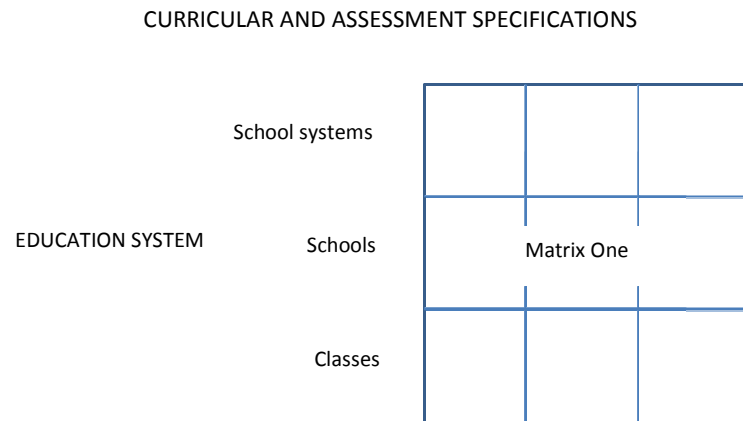
Matrix One explained: The horizontal dimension of the *education system* is concerned with the rigidities in the system that affect all children in general such as compartmentalised services, fragmented funding and the diversity of needs. An example of a rigidity within a *school system* may include the problems associated with the transition between primary and secondary school when learner progress plateaus or declines. Rigidities in individual *schools* that impact on inclusive education include issues such as inflexible timetables, lack of innovation in service delivery or reluctant staff. An example of a rigidity in a *class* set up are schools that still tend to set classes on traditional dominant groupings that do not necessarily take diversity into account.

The vertical dimension of the matrix refers to mainstream curriculum and conventional assessments, neither of which as they stand, are suitable for effective inclusive education. For the purposes of this study I was particularly interested in how the schools I researched adapted their timetables, service delivery, their curricula and their assessment procedures in their quest to be more inclusive, as viewed and understood by principals.

- **Matrix Two (see Figure 2)**

Matrix two measures the interrelatedness between student diversity and curricular expectations and highlights that inclusive policies need to take diversity into account *in the planning stages.*

FIGURE 2: **MATRIX TWO – CURRICULAR EXPECTATIONS (ADAPTED FROM WEDELL, 2005)**

CURRICULAR EXPECTATIONS

|	Skills	Knowledge	Understanding	Attitudes
STUDENT DIVERSITY			Matrix Two	

Matrix two explained – this matrix offers a "different starting point for moving towards flexibility" (Wedell, 2005). It is intended to show the interrelatedness between learner diversity and curricular expectations with a view to facilitating the delivery of a curriculum that specifically meets the needs of a more diverse population of students. It also requires a change in attitudes and an understanding of the nature of diversity and types and levels of needs which include needs that are common to all, needs that are common to some, and needs that are unique to an individual. Levels of needs have implications for increasing levels of expertise as well as for a restructuring of the curriculum. I was particularly interested in using matrix two to analyse not only the interrelatedness between student diversity and curricular expectations but also the nuances of this interrelatedness at the schools I studied.

- **Matrix Three (see Figure 3)**

Matric three examines the problems of implementing inclusive education in conjunction with the concern that the present system fails to prepare students for the future. This matrix

provides a realistic evaluation of the changes that need to be made if inclusion is to be successful including the interrelatedness of teaching-learning approaches, the nature and level of expertise and the variety of student groupings and locations where learning occurs. Studying these features could have implications for policy and practice and could also provide clues to how flexible a school has to be to ensure high-quality inclusion.

FIGURE 3: **MATRIX THREE (ADAPTED FROM WEDELL, 2005)**
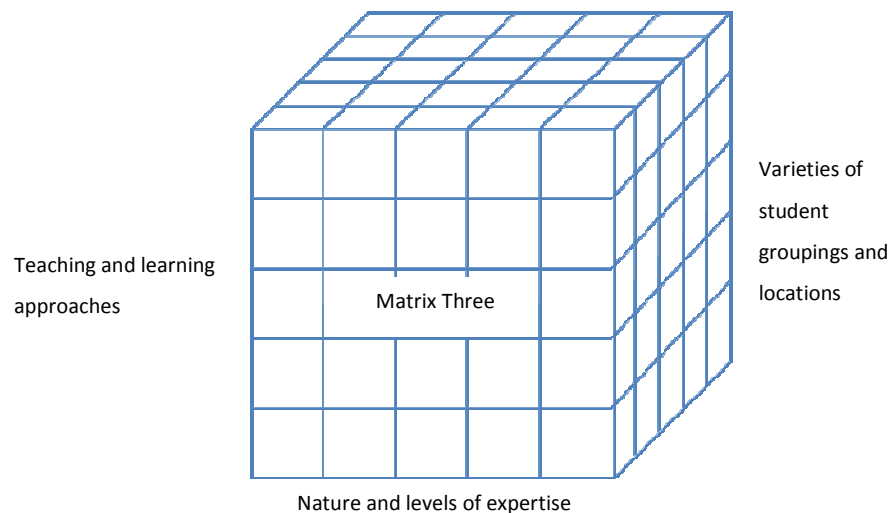
Matrix three explained – the third matrix offers a framework for a realistic evaluation of the changes that are needed for a more inclusive system specially the interrelatedness of teaching-learning approaches, the nature and levels of expertise, and the variety of learner groupings and locations in which learning occurs (Wedell, ibid). Issues that particularly interested me from this matrix included how the principals enhanced inclusivity in their schools. In other words, how did they create opportunities for personalised learning, how did they encourage staff to collaborate with other professionals in their service delivery, and how did they suggest that classes be grouped for learning.

These three matrices as a whole were pertinent to the research questions as set out in the purpose of this study. Matrix One helped me to focus on how the understanding of inclusive education by principals shaped the school system and what happened in individual classes. Matrix Two illuminated how the understanding of inclusive education influenced the planning of inclusivity within a school, and Matrix Three answered how the understanding of

the inclusive system affected the steps that were taken to make a school more effectively inclusive. The information that was gathered from this process was qualitatively analysed for tentative answers to the two research questions, that is: how is inclusive education understood by principals in independent South African schools, and what implications does the understanding of inclusive education have for the practice of inclusive education in individual schools?

3.3   RESEARCH DESIGN

3.3.1   RESEARCH AIM

The intention of this research was to use narrative research (Creswell, 2002) to describe and explain how principals in independent schools in five different provinces in South Africa understood the concept of inclusive education. It was my intention to highlight what it was that enhanced or limited the implementation of inclusive education in independent schools which may have had more resources than public schools. I aimed to uncover the differences in understanding inclusive education by focusing on the following research questions:

- How is inclusive education understood by principals in independent South African schools?
- What implications does the understanding of inclusive have for the practice of inclusive education in individual schools?

3.3.2   RESEARCH PARADIGM

I made use of feminism to frame this study which aimed to discover how inclusive education is understood by principals. I did this for several reasons. Although feminism is primarily concerned with gender issues it is also concerned with power issues. Feminism questions the authenticity of research that contributes to oppression and which keeps groups hidden (Cohen, Manion & Morrison, 2000). It seeks to level unequal power relations by substituting with a different agenda, an agenda of "empowerment, voice, emancipation, equality and representation for oppressed groups" (ibid, p. 35). Its concern is not only with those who are hidden but also with those who have been silenced. To this end, the emancipatory nature of this kind of research interrogates the status quo (ibid; Olesen, 2000; and Palestini, 2003).

Furthermore as Olesen (2000) claims, new ideas can be generated from feminist research that can destabilise "knowledges about oppressive situations" (p. 216). Fontana and Frey (2000) make the point that feminism allows a researcher to reinterpret and understand data as an alternative to traditional "masculine interpretation" (p. 656). As a feminist researcher, I was interested in understanding how traditional thought patterns shaped the practice used by leaders in creating an inclusive culture within a school and how this served to liberate not only children, but themselves as leaders. The challenge was to find ways that were offering an alternative kind of leadership, that by being inclusive, children were being provided with opportunities of being educated with their peers and of empowering themselves.

A caveat regarding feminism is that it has its limitations as Olesen (2005) illustrates in her article on feminist qualitative research. According to her, women with disabilities can be "a problematic issue for feminists" as "even sympathetic research on women with disabilities tended to overlook women's multiple statuses and view women solely in terms of their disability" (p. 243). A limitation of feminism is that as the researcher I had to be aware that the methods I used did not subtly force any preconceptions onto the process, nor that my own subjectivity on the subject of inclusive education clouded the validity of the study (Cohen, Manion & Morrison, 2000). Along with authors such as Krenkse (2002) and Enomoto and Bair (2002), I however believe that any study is a reflection of a researcher's own inner life (Krieger as cited in Enomoto & Bair, 2002) and "that the explication of the researcher's self is an integral component in the research process" (Krenske, 2002, p. 285). I accept therefore that it is not possible for a researcher to be neutral in the research process. Ellingson (2009) makes clear that an author cannot be "innocent or disconnected from the politics of academic publishing" (p. 34) or put differently, a researcher is not divorced from being in a position of power in terms of representing findings. A final word on this point is that "knowledge is not produced by disembodied voices" (ibid, p. 36) but by "researchers whose bodies unavoidably influence all aspects of the research process and of knowledge production" (Ellingson, 1998 as cited by Ellingson, 2009, p. 36). An additional problem that arises in research is when qualitative research projects create Otherness (Fine, Weis, Weseen & Wong, 2000). These authors and especially Weis and Fine (2005) have done much research on the exclusions experienced by children based on class, race and gender in education and they are particularly concerned with research that reproduces "a colonizing *[sic]* discourse of the "Other"" (Fine as cited in Fine et al., 2000, p. 108). To ensure that my

own subjectivity did not overshadow the validity of the study, nor that I inadvertently created a discourse of Othering, I checked for this continuously during supervisory discussions, by revisiting the literature, by discussing my topic with experts, by member checking and by keeping up with the latest research.

3.3.3   RESEARCH METHODOLOGY

The empirical component of this research was to engage biographical narrative research in order to examine eight independent school systems in South Africa. The schools were elite independent schools in five different provinces of South Africa namely the Western Cape, Gauteng, the North West Province, the Limpopo Province and Mpumalanga (see Map 1 below).

MAP 1:   THE PROVINCES OF SOUTH AFRICA*

* Sourced at http://en.wikipedia.org/wiki/Provinces_of_South_Africa

Exploratory discussions with principals confirmed that it was likely that these particular schools were willing to participate in my research. The eight schools had all adopted the paradigm of inclusive education at some point in the past and they have slowly but consistently moved forward as inclusive schools as all of them have admitted a number of

children with a variety of disabilities. All the schools therefore were rich sources of information in terms of the practice of inclusive education.

I used a qualitative research approach for this study because I intended probing the understanding of inclusive education by principals and the implications this had for the practice of inclusive education. A qualitative approach addressed the meanings and interpretations of these experiences. I made extensive use of crystallisation to as a quality strategy for this thesis and I did this for several reasons. Firstly crystallisation as developed by Ellingson (2009) is defined as combining,

> "multiple forms of analysis and multiple genres of representation into a coherent text or series of related texts, building a rich and openly partial account of a phenomenon that problematizes *[sic]* its own construction, highlights researchers' vulnerabilities and positionality, makes claims about socially constructed meanings, and reveals the indeterminacy of knowledge claims even as it makes them" (p. 4).

Several of the characteristics of crystallisation are that as a quality strategy it is able to "offer deep, thickly described, complexly rendered interpretations of meanings" (p. 10), it allows for "reflexive consideration of the researcher's self and roles" (ibid) in the process and it eschews "positivist claims to objectivity and a singular, discoverable Truth in favour of embracing knowledge as situated, partial, constructed, multiple, embodied, and enmeshed in power relations" (ibid). Furthermore, crystallisation encourages the researcher to respect and honour the participant and to consider the accounts of their experiences as being valid.

The critical questions posed in this study were explored through biographical narrative research which illuminated how inclusive education is understood by principals in eight independent schools. According to Creswell (2002), who cites Connelly and Clandinin (1990), narrative research is used to "describe the lives of individuals, collect and tell stories about people's lives, and write narratives of individual experiences" (p. 521). Narrative research therefore gathers stories and then discusses the meanings of those experiences for the individuals (ibid), or as Clandinin and Connelly (2000) succinctly explain, " narrative inquiry is a way of understanding experience" (p. 20). Trying to understand experience is "a unique qualitative analytic procedure used only in narrative research" (Creswell, 2002, p. 521). In line with crystallisation, narrative research embraces different forms and "[l]ike the art and

science or portraiture discussed recently in the social sciences, this design involves drawing portraits of individuals and documenting their voices and their visions within a social and cultural context" (Lawrence-Lightfoot & Davis, 1997, as cited in Creswell, 2002, ibid). This approach afforded me the opportunity to gain an in-depth insight into personal experiences of how principals understood inclusive education and it illuminated how their understanding affected their schools. Several of the functions of narrative research which were pertinent to this study was to focus on principals' reflections of their own practices; to examine their knowledge including "what they know, how they think, how they develop professionally, and how they make decisions" (Creswell, 2002, p. 521); and by empowering principals to talk about their experiences, I enabled them to bring their "voices to the forefront" (ibid). To this end, the narrative approach presented new ideas for further research into how principals functioned in their contexts, what they knew, how they thought, how they developed as professionals, and how they made the decisions they did.

I used a purposive sampling strategy to select principals in suitable school contexts that met the criteria (Neuman, 2006, and Trochim, 2001) I wished to study. The criteria for this study included selecting principals of independent schools where some degree of inclusive education was taking place, or had taken place, and who were willing to participate in the research. In the end eight principals were selected. Six of the principals were acting as principals at the time I did my research. A seventh principal had moved on from his school where he had implemented inclusive education during his tenure at the school and had become a Director of Education of eighty schools in a neighbouring province. The selection of the eighth principal rested on her previous position as principal of an exclusive school for children with disabilities. Although she was the head of School D, which is on the campus of School E, she met the criteria I had chosen. The criteria in this case was that I wanted to interview individuals who as principals had been actively involved in implementing inclusive education in their schools. All the principals selected fulfilled this criteria even though the positions of two of them had evolved and changed with time.

According to the literature, the selected sample represented a particular group that did not necessarily represent the wider population. The sample represented only itself, as Cohen, Manion and Morrison (2000) point out, but at the same time, a purposive sample is suitable for "small scale research" (p. 102). It is important to highlight that research based on

purposive sampling has limited, but not weak, external validity (Trochim, ibid) and the findings are not necessarily generaliseable. I have stated that from my knowledge of where inclusive education was taking place, I believed that the study would be most useful if it was undertaken in the context of independent schools. I would however like to reiterate the following:

1. Although WP6 is the policy framework for inclusive education in South Africa, there are numerous challenges within the education system. The independent schools that I selected to study are pioneers in the field of being inclusive in South Africa. They fulfil the requirements of being schools that specifically typify the conditions I wished to study which were schools known to be practicing inclusive education to some degree.

2. Remembering that the success of inclusive education depends on a strong leader (Angelides, 2004; Cole, 2000; Coleman, 2002; Daane et al., 2001; Hunt et al., 2000; Palley, 2006; and Taylor, 2005), understanding the conditions that contribute to why some schools are open to adopting the notion of inclusive education while others are not, will assist in the creation of tentative understandings within the field. Samoff (2005) said in a lecture about successful transformation in schools, "what needs to be reproduced are the conditions that contribute to transformation". Although he was describing the racial transformation that took place in a previously white school in South Africa, any transformation in a school requires certain conditions that have the potential to be replicated. Understanding the conditions that lead to endeavours at implementing inclusion may lead to a greater understanding of what is needed to implement inclusive education successfully in other schools.

3. The third underlying principle for selecting these schools was a practical one. In my dealings with the Independent Schools Association of South Africa (ISASA) I knew the principals through association. Being known to the participants made access easier for in-depth engagements with the principals.

The final selection of the schools was dependent on:

- The granting of permission for the study by the principal concerned.

- The willingness of the principal to participate in the study.

3.3.4 DATA COLLECTION METHODS

The methods of data collection for this study provided the linkages between the broad research questions and the data analysis. Three different methods (Trochim, 2001) were used to prepare the data namely:

- Individual in-depth, semi-structured interviews were used to interview the principals.

- Cursory direct observations were used to observe the principals in action. Interactions between the principals and their staff and students were observed although this was not a major data source in the study.

- Legal and policy documents as well as the websites that represented the public faces of the schools were examined for references to the inclusive nature of the schools.

The advantages of the individual in-depth, semi structured interviews include being personal and flexible (Cohen, Manion & Morrison, 2000) in that semi structured interviews, unlike surveys, can be used by the interviewer to probe thoughts at depth (Trochim, 2001). They can however be time-consuming and a considerable amount of planning is required to arrange meetings that suit both parties. The advantages of direct observations are that they can be done as a non participant who strives to be as unobtrusive and unbiased as possible. Although observations can be videotaped, this was not a technique that was chosen for this study (ibid). Legal documents and websites provide static information and they are a source against which practice can be measured. The disadvantage of a website however is that it is often maintained by someone other than an educator who may not be in touch with the ethos of the school to the extent that a principal or a teacher may be. In addition, the information on a website may be inaccurate or out of date.

3.3.5   INDIVIDUAL INTERVIEWS

In-depth interviews were based on questions that were open-ended and semi-structured. Each interview did not last longer than two hours and was conducted in neutral environments as far as was possible and practicable. The interview process focused on the following questions (adapted from Bailey, 2004):

•   What type of school do you run and what role does it play in the independent school sector?

•   What are your biographical details and academic qualifications?

•   For how many years have you been a principal?

•   How many staff are there in the school. How many children do you service?

•   How many children with disabilities have you actively included and what are your admission requirements?

•   What support services are available to the school?

•   What were the attitudes of teachers, children and parents to the inclusive process?

•   How have outside colleagues responded to the inclusive process in your school?

•   What are the strongest arguments for inclusion?

•   What are the greatest disadvantages of inclusion?

•   What are the essential factors that are needed to make inclusion work?

•   How has the literature influenced and shaped your thinking about inclusive education?

•   Has a belief system shaped your understanding of inclusion?

•   How has the process of inclusive education in your school shaped your personal understanding of inclusive education?

Additional questions were asked as is characteristic of semi-structured interviews and the more pertinent ones were as follows:

•   How was resistance to the process managed?

•   Was bullying evident and how was this managed?

•   What was the moment of significance that might have influenced your personal openness to inclusion?

- How are staff supported and what support structures are in place? (see Appendix D for details on how these questions were formulated).

In line with the literature, (Bailey, 2004; Cohen, Manion & Morrison, 2000; and Trochim, 2001) questions were formulated in a non-threatening manner so that participants felt comfortable answering them. After introducing myself and providing the background to the study, I began by requesting permission to audiotape the interview. I then continued by asking for biographical and educational details regarding their positions at the school as well as asking questions about the nature of their work. I moved on to asking them about their perceptions regarding the notion of inclusive education in general and then more specifically of their experiences of inclusive education in their schools. I asked further unstructured questions that deepened the knowledge base such as "Can you give me a concrete example?" or "I have not fully understood your point. Could you clarify what you mean?". According to Fontana and Frey (2000) feminist researchers debunk neutrality in interviewing and deliberately use "interviewing for ameliorative purposes" (ibid, p. 666). Furthermore Denzin, as cited in Fontana and Frey (ibid) claims that "those studied have claims of ownership over any material that are produced in the research process" (p. 666). For this reason, transcripts were sent to participants in order for participants to check them.

The interviews for this study were people-centred and were conducted with eight principals in five different provinces. The planning for the interviews were mostly easily arranged via landline, cell phone or email and the original appointments were kept in all the cases. The making of the appointment with one principal was problematic in that it was difficult identifying his personal assistant. On the whole however, appointments were made without problems and directions for finding the schools by car were mostly accurate.

All of the participants responded well to the questions in the interviews which were relaxed and which were perceived to have been enjoyed by both parties. One principal was slightly defensive for the first twenty minutes of the interview but he relaxed as we spoke. On the whole, participants were eager to be involved in the process and they quickly settled into the interviews. The interviews were highly informative and the data gathered has proven to be extremely rich. More will be said on the interviewing process in Chapter Four.

3.3.6 DIRECT OBSERVATION

Because of my presence at the schools very brief and unstructured on-site observations were made of the principal. Cursory observations were made of principal/staff interactions and principal/student interactions. These observations however were *not* a major part of this study since the data gathered from the interviews was the primary source for the analysis and findings. A characteristic of direct observations nevertheless, according to Trochim (2001), is that the observer tries to be as inconspicuous and as detached as possible so as not to prejudice the observations. Cohen, Manion and Morrison (2000) describe the process of observing as being a continuum with the midpoints striving for balance between involvement and detachment. A further function of observation was to help the researcher to uncover the complexities of social situations by "being there" (Rossman & Rallis, 2003, p. 194). The idea was to gain insight into the bigger picture of the principal's role in the inclusive process and to make systematic notes of "events, actions and interactions" (ibid) in order to infer deeper meanings of such actions. I was more interested in a qualitative and "holistic description of events and activities" (ibid) rather than on detailed checklists. I hoped to "discover things that participants might not freely talk about in interview situations" (Cohen, Manion & Morrison, 2000, p. 305) as well as to determine the dynamic nature of trends, patterns and events. Observation on its own was not enough to ensure reliability and validity and for this reason I took field notes as well.

3.3.7 TAKING FIELD NOTES

The purpose of taking field notes is to systematically record impressions, insights and emerging themes and hypotheses (Rossman & Rallis, 2003). Cohen, Manion and Morrison (2000) advise that two types of notes be kept of observational data both "in situ and away from the situation" (p. 146). Neuman, (2006) describes an emic approach as "perceptions and understandings" of the "insider's" culture (p. 449). In addition, the emic enquiry is useful for building in and building on tacit knowledge and therefore "takes seriously their notion of the 'human instrument' in research" (Cohen, Manion & Morrison, 2000, p. 152). For these reasons, I made notes on site while observing, and expanded on these notes immediately after the observations. By using the emic approach, I described what I have observed although I kept in mind that observations can be subjective and biased. Despite the

limitations of taking field notes based on observation, I have included them into this study as a methodological choice.

3.3.8   DOCUMENT ANALYSIS

For this study I analysed a variety of documents including:

•   Legal documents: the Constitution of South Africa.

•   Policy documents: WP6 and the "Draft National Strategy on Screening, Identification, Assessment and Support" dated February 2006 which "outlines the roles of teachers, parents, managers and support staff within the framework of a completely new vision of how support should be organized" (p. 3).

•   Relevant policies published by the selected school that outline their philosophy and practice of inclusive education.

•   The 'public faces' or websites of each school in order to establish how schools explain their inclusive natures to internet searchers.

The documents and websites were analysed by a set of codes (Creswell, 2005). New themes that arose from continuously revisiting the literature and reading the latest research was included into the thesis on an on-going basis. This was to ensure that the research remained up to date with the latest findings in the field of disability studies and inclusive education.

3.3.9   APPROACH TO THE COLLECTION OF DATA

Interviews with the principals were done once during two-hour sessions. Appointments were made in advance and the list of questions were forwarded to the participants beforehand in order for them to familiarise themselves with the content. Although all participants had received the questions by the time I arrived for the interview, not all of them had read through them prior to the interview.

3.3.10   BRINGING THE DATA SOURCES TOGETHER

In order to bring large chunks of data into a coherent whole, Cohen, Manion and Morrison (2000) point out that this can be done in a number of ways. The technique that I used was one of using coding (Creswell, 2005) on the data segments, the field notes, the legal documents and the websites. The coding I used arose from the data and were at first broad descriptions which were then narrowed down into broad themes. The themes were then chunked together into new categories which finally resulted in five themes with several subthemes and caveats. This was done in the way that Becker and Geer (1960) have outlined (as cited in Cohen, Manion & Morrison, 2000). Firstly, the responses of the participants were compared with observed behaviour and field notes. Secondly, linkages between the data were identified and described. Thirdly, I was careful in portraying each data source as a fair "representation of the context" (ibid, p. 148). As Clandinin and Connelly (2000) point out, "an inquirer composing a research text looks for the patterns, narrative threads, tensions, and themes either within or across an individual's experience and in the social setting" (p. 132). These authors point out, and as I found out for myself, that this was a complex process with "no smooth transition" (ibid). It required reading and rereading transcripts as well as listening to the audiotapes to establish the nuances not evident in the written word. The intent however was to seek out answers to questions surrounding meaning and social significance despite the uncertainty that accompanied such as exercise (ibid).

3.3.11   RESEARCH DIARY (SEE APPENDIX E FOR AN EXTRACT FROM THE DIARY)

In order to remain reflexive in my research I used a personal journal for recording my experiences, my observations and my own responses to what I saw and heard. The writing of the journal kept me focused on the process and helped me to continually evaluate and improve on the process as it unfolded. I recorded tangential thoughts that led me to an ever-deepening understanding of inclusive education and principals' understandings of inclusive education.

3.3.12   DATA ANALYSIS

In order to understand the phenomenon I studied, or the "outcropping" as Neuman (2006) describes what can be observed, the analysis of the data was consistent with the principles of qualitative research and were therefore inductive and progressive. Cohen, Manion and Morrison (2000) and Rossman and Rallis (2003) point out that although data analysis is something that happens throughout a study, it begins during the data collection process so that the researcher can start reducing the large amounts of data collected at an early stage. According to Neuman (2006), a researcher uses "conceptualization *[sic]"* (p. 460) as a way of organising and making sense of data. Data analysis is essentially a process that makes sense of the data which is done by collating, coding and explaining it from all the sources in order to describe, analyse and interpret it. A first step is to explore the data to get a sense of it (Creswell, 2005), and then to identify themes or categories as well as text segments. One of the steps in identifying themes is to group them into major, minor and interrelated themes and then to code the themes with short two to four word descriptions (ibid). Creswell (ibid) also suggests that researchers make use of "axial coding" (p. 423) which allows the researcher to put codes together "in new ways by making connections between categories" (ibid). Neuman (2006) maintains that axial coding is a "second pass" (p. 462) through the data and that this exercise allows one to firstly "review and examine initial codes" (ibid) and secondly, to organise themes and pinpoint the alignment of the key concepts. In this way subthemes or subcategories could emerge which in turn could lead to new findings. In so doing, one could "build a dense web of support" amongst the core themes which will strengthen the "connection between evidence and concepts" (ibid, p. 464). This exercise could offer a new paradigm for the relationships that exist between the categories and so extend the study. In addition, selective coding (Neuman, 2006) potentially has significance for a feminist study and was utilised to look for differences in how male and female principals understand inclusive education as well as potential differences in their attitudes towards the topic. Another tool that was useful in this study was the "negative case method" (ibid, p. 478) which provides a researcher the opportunity to "study what is *not* explicit in the data or what did *not* happen" (ibid, p. 478). In this way previously unknown factors regarding inclusive education were uncovered. And lastly, what was kept in mind was that data are the representation of the so-called tip of the iceberg, or for want of a local equivalent, the ears of the hippo, only. Neuman (2006) refers to the reality of a study as

'outcroppings' (p. 466) and he argues that one needs to study the outcroppings in order 'to get clues about what lies beneath the surface' (ibid). What lies beneath the observable data are 'deeper structures' and social 'forces' which explains that which is seen. Ellingson (2009) compares research to quilting and she too says that a quilt "hides as much as it reveals" (p. 98).

After coding the data, the next step was to represent the findings and then to report and summarise the findings. A comparison with the literature was an essential exercise in order to draw the researcher towards a conclusion about the research. A last step was to outline the limitations and successes of the research and to suggest areas for future research (Neuman, 2006).

3.3.13   VALIDATION STRATEGIES

The trustworthiness of reported observations and interpretations of interviews would strive for maximum validity through the following mechanisms:

3.3.13.1 Crystallisation

A crystal is a prism which is made up of facets that mirrors itself. As Richardson (cited by Ellingson, 2009) says " [c]rystals are prisms that reflect externalities *and* (original emphasis) refract within themselves, creating different colors *[sic]* patterns, and arrays, casting off in different directions" (p. 11). By engaging crystallisation in qualitative research as a quality strategy one creates a depth which is in addition to Geertz's (Cohen et al., 2000), quest for a "thick" description. It allows one to use analytic as well as artistic interpretations, it permits the use of "more than one genre of writing" (ibid), it embraces reflexivity in research, and it always sees research as partial truth. In addition, *"*this postmodern form of triangulation allows researchers to view the topic through multiple lenses, enriching understanding and reinforcing the partial and constructed nature of all knowledge claims" (Ellingson, 2009, p. 190). This method can be likened to a tennis player who knows the court so well that she "plays the edges" (Dillard in Ellingson, 2009, p. 190) and who perfects this skill. Crystallisation embraces this playing of the edges or "wild power" (ibid) as it is called by Dillard, and it is what gives a study its energy. Crystallisation "skirts the edges of academic

publishing conventions, drawing power from art, science and endless combinations of artful science and scientific artwork" (ibid).

3.3.13.2 Participant validation

The interviews were audio taped and transcribed and were returned to the interviewees for checking to correct factual errors, to add information and to check the adequacy of the final analysis. Only two transcripts were returned to me, one came back without any corrections or additions, while another came back with numerous additions. I chose in the end to stay with the original transcript as many of the additions suggested by the participant were guesses at what had been said. To recall, one audio taped interview was of poor quality and text was missing. Rather than accept the suggestions, I opted to use the original transcript as the missing text did not impact significantly on the end result.

3.3.13.3 Peer review

Professor Juan Bornman and Dr Suzanne Bester of the University of Pretoria agreed to act as critical readers and as experts on inclusive education further tested the validity of my own observations. They both have extensive experience in the field of disability and I considered them as worthy critics of my study.

3.3.13.4 Rich (thick) description

A term coined by Geertz (Cohen et al., 2000), describes a depiction of an event that is not reducible to simplistic interpretations. In this case the study rigorously analysed the understandings, thoughts and feelings of principals of independent schools about inclusive education in particular settings. The results, which are underpinned by the evidence provided, nevertheless speaks for itself so that the reader can come to his or her own conclusions.

3.3.13.5 Interpretive explanation

This method was used in order to "foster understanding" (Neuman, 2000, p. 58). A researcher using interpretive explanation "attempts to discover the meaning of an event or practice by placing it within a specific context" (ibid). Furthermore, since "[m]eaning comes from the context of a cultural symbol system" (ibid), a researcher "tries to comprehend or mentally grasp the operation of the social world, as well as get a feel for something or to see the world as another person does" (ibid). As a researcher this sums up what I was attempting to do in this thesis.

3.3.14   LIMITATIONS OF THE STUDY

All studies have their limitations and this one was no different. The weaknesses that needed to be kept in mind in this study include the following points which have been adapted from Cohen, Manion and Morrison(2000) and Creswell (2002):

- My presence may well have influenced the responses I got from principals which may negatively affect the validity of some of the data.
- Observer bias could have been problematic despite the attempt to be reflexive.
- Establishing the authenticity of a story needs to be ensured in narrative research as a narrative researcher relies "heavily on self-reported information from participants" (Creswell, 2002, p. 532). Data can therefore be manipulated by participants who may attempt to "fake the data" (ibid).
- The results of the feedback may or may not be generaliseable to the broader population of schools. The deep insight gained from the process however, may be a stepping stone to a variety of interpretations which in turn could be used to influence, democratise and offer an emancipatory effect on decision-making in the educational field.
- There may have been possible researcher identification with participants.
- Variations in how inclusive education is understood may be evident in different provinces and by different participants.
- The participant's voice may be lost and superimposed by the researcher's story and the researcher's gain may be at the expense of the participant.

In order to compensate for the limitations of the study the collection of field texts, the method of crystallisation and member checking can ensure that the data that is collected is good. Creswell (2002) also makes the point that "any story has an element of truth in it" (p. 532). By remaining aware of the problems associated with the collecting of data, I have taken care not to contaminate the data with my own interpretations and perceptions but to work with what was said to me.

3.3.15   STRENGTHS OF THE STUDY

The strengths of the study follows:

- According to Clandinin and Connelly (2000), "every response is valid to some degree and contains the seed of an important point" (p. 181). In other words participants' voices and experiences were recorded and deemed valid for this research.

- A story that would have remained untold has been created and "narrative secrets" (ibid, p. 182) have been revealed.

- The themes that have emerged may hold important stories and pointers for others.

- Underlying narrative research is "the assumption that storytelling is integral to the understanding or our lives and that it is ubiquitous" (Rossman & Rallis, 2003, p. 99). Narratives are thus an important method of enquiry and this study may contribute to this effect.

3.3.16   ETHICAL CONSIDERATIONS

This study was dependent on an ethical clearance certificate from the University of Pretoria. For this reason, I used the guidelines from the Faculty of Education's Ethical Statement to negotiate with the schools concerned (see Appendix F for the ethical clearance certificate).

Ethics as defined by Sieber (2004) is "about supporting values such as respecting people and their communities and benefiting individuals and society" (p. 402). Ethics is however also about obtaining informed consent from those one wishes to research (ibid) as well as assuring one's subjects of anonymity and confidentiality. A researcher needs to take ethical

issues into account before proceeding with research in order to avoid ethical dilemmas and to "strike a balance between the demands placed on them as professional scientists in pursuit of truth, and their subjects' rights and values potentially threatened by the research" (Cohen, Manion & Morrison, 2000, p. 49). As these authors point out, ethical issues may arise at any stage in the research process and researchers need to be aware of these kinds of problems. In addition, Ellingson (2009) argues that in line with crystallisation, one needs to write in such a way as "to do no harm" and to "promote social justice" (p. 40). The directive that Ellingson gives a researcher is to continually reflect on the "ethical implications" of processes and products (ibid), to avoid oversimplifying "manifestations of power and resistance" (ibid, p. 41), to conduct member checks, to share the process with others, to remember that no innocent position exists and lastly, to continue to work with and represent others. Ellingson (2009) also urges researchers to continually confront prevailing discourses and to provide platforms for less powerful voices.

For the reasons mentioned above, care has been taken in ensuring that correct procedures were followed at each stage of the research process (see Cohen, Manion Morrison, 2000, p. 57). Participants were assured of anonymity and confidentiality. Permission was requested in advance and the intrusion into their spaces was done as unobtrusively as possible. Participants were informed about the interview process and they were given a list of the questions prior to the interview. As valued participants, they were asked to participate in member checking of transcripts and interpretations. They were informed of what would be done with the study and they will receive a letter of thanks for participating in the research. Finally they will be given a summary of the outcomes of the research.

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