# CHAPTER 1

## A SPECIAL CHAPTER:
## INTRODUCING THE WHAT AND WHY OF THE RESEARCH

The concepts *inclusive education and participation* and *special needs* surface from a quagmire of educational concepts as two current national and international polemical educational concepts.  Key questions relate to the meanings of *inclusive education and participation*, and specifically what *inclusive education and participation* means in the South African context.  It is highly likely that there are differences in the policy and practice of *inclusive education and participation* in different countries, such as in developing and developed countries.  A major issue in the inclusive education debate is whether education can be inclusive but not participative, or participative but not inclusive (Department of Education, 2001: 16, 19; Sayed, 2003: 6; Väyrynen, 2003: 39, 41).  Further, it is not always clear who is included to participate, and who is excluded from participation; and who has the power to include and exclude.  Most important, is whether inclusion or exclusion creates the most effective learning environment for the learner.

Similarly, further questions relate to the meanings of the currently somewhat questionable concept *special needs in education*[1]*,* and specifically what *special needs in education* means in the South African context.  Again, it is highly likely that there are differences concerning the concept *special needs* in different countries, such as in developing and developed countries.  Within the context of each policy implementation it should be considered afresh who has special needs, when needs become special, and when needs cease to be special. It also needs to be spelled out *where* special needs could be provided for and who are to make the provision.  The role of impairment and disability in conceptualising the term *special needs* and the influence of our own experience of impairment on our thinking should be considered.  Most importantly, the implications that our beliefs hold for learners purportedly with and without special needs should bear serious contemplation.

Regardless of being exposed to inclusive or exclusive educational practices, and/or being categorised as having special needs or not, all learners have an *academic self-concept*: an opinion, based on self-perceptions of themselves as learners and of the quality of their academic work.  One should consider what academic self-concept entails in South Africa specifically.  Given the demographics and degree of Westernisation of South Africa, the

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[1]  Please refer to 2.4.1 for a discussion of the term *special needs*.

prevalence of, or mutual (in)dependence between, an individualistic academic self-concept and a collective academic self-concept should be considered.  The macro and micro processes contributing to the formation of the academic self-concept of learners and the factors influencing the academic self-concept require contemplation, as well as the role that school context plays in the accuracy of the academic self-concept.  It is uncertain what would be better: an unrealistically high academic self-concept, or a realistically low academic self-concept.  It is highly likely that a high and low academic self-concept give evidence of certain factors and conditions in a school.  Therefore, it is argued that the academic self-concept of learners with special needs might give evidence of the school context the learners find themselves in.

The key issue of this thesis is, *How does academic self-concept reflect the practices of inclusive education and participation in different school contexts*?  Once the usefulness of knowledge of the state of the academic self-concept has been established for inclusive education and participation practices, one could use this learner-centred indicator to confirm, modify and/or contribute to future inclusive educational practices.

## 1.1    ORIENTATION

The inclusive education and participation policy of South Africa is founded on internationally accepted beliefs (Emanuelsson, 1998: 95-96, 104; Keefe & Davis, 1998: 57) and was developed to address and redress the various disparities in education, specifically special needs education (Department of Education, 1997: 105).  Prior to 1994, apartheid policies led to disparities in the availability, accessibility, resourcing and quality of special schools.  Special schools that accommodated so-called non-white learners with impairments were fewer in number, less accessible, less well resourced, and of a poorer quality than special schools for white learners with impairments (Human Sciences Research Council, 1987: 69-74, 80-81).  Currently, special schools are still unable to provide education for about 80% of all learners with impairments (Department of Education, 2001: 9; for an example in Kwazulu-Natal, see Muthukrishna, Farman & Sader, 2000: 87).  This situation poses a serious threat to the aim of Quality Education for All (Department of Education, 1997).

The South African government has taken several legislative measures to address the various educational challenges of providing quality education for all, particularly for learners experiencing barriers to their learning and participation.  First and foremost, the Bill of Rights in the Constitution ensconces the notion of equal access to basic education for everyone and prohibits unfair direct or indirect discrimination on several grounds, including race and

disability (Republic of South Africa (RSA), 1996a: sections 9(1), 9(3) & 29(1)).  Equality in access to basic education and avoidance of discrimination subsequently formed the building blocks of the long-awaited Education White Paper 6 (EWP 6), *Special Needs Education: Building an inclusive education and training system,* that was finally published in July 2001 (Department of Education, 2001: 11).

The worth of the inclusive education and participation policy, as stated in the EWP 6 (Department of Education, 2001), will ultimately depend on the congruency between policy and practice.  Several dangers are possible in a matter-of-fact implementation style: for example, without continuous reflective thought about and evaluation of the process, the learners experiencing barriers to learning and participation (who should derive benefit from the policy by attending full-service inclusion schools), could actually be inflicted harm.  It therefore seems important to ascertain how learners experiencing various barriers to learning and participation (BLP) judge their academic abilities if class peers make fun of them, if educators are seen to adapt (or neglect to adapt) the learning material for them, or if they perceive themselves inferior to those peers who master the learning content without any accommodations.  Further, it is also important to ascertain how learners without BLP judge their academic abilities if they see learners experiencing BLP achieve good marks.

It is argued that an essential criterion to establish the congruency between the inclusive education and participation policy of South Africa and its implementation is the academic self-concept (ASC) of all learners.  The ASC of learners is influenced by their context and, therefore, by all the systems that contribute to their context: the education, school, class, family, social, personal and value systems, and less directly, the political and economic systems.  Examples of factors found in the systems that may contribute to the ASC are attitudes of educators and peers towards learners, acceptance of learners and their abilities, reward and punishment systems adhered to by the school and the educator, the influence of significant others and reference groups, feedback from others, the amount of difficulty experienced in class, and school marks (Hattie, 1992: 48, 250; Kotzé, 1993: 6; Marsh & Yeung, 1997a: 49; McCreary-Juhasz, 1992: 212; Nthoba, 1999: 26).  The ASC can, therefore, be regarded as the product of different factors in various systems and may have significant diagnostic value in a school and class system.  Being the product of various factors in various systems, the ASC can also be regarded as an indicator of the 'health' or wellness of a system, especially the individual, class, school and education systems.

Not only is the ASC the product of various influences, it is also a powerful predictor of academic behaviour.  A reciprocal relationship appears to exist between academic

achievement and ASC, implying that academic achievement can influence the ASC and, in turn the ASC can influence the academic achievement (Ferreira, 1992: 74; Grobler, Myburgh & Kok, 1998: 49; Marsh & Yeung, 1997a: 49; Marsh & Yeung, 1997b: 693, 714-715; Nthoba, 1999: 27; Strein, 1993: 280).  There is much research, moreover, that demonstrates that subject-related ASC relates significantly more strongly with subject and eventual career choice than academic achievement (Marsh & Yeung, 1997a: 49; Marsh & Yeung, 1997b: 694, 709, 715; Martin & Debus, 1998: 517).  In other words, ASC has more predictive value than academic achievement, and (subject-related) ASC can have significant influence on all learners and their future.

One of the factors that may contribute to ASC, is the various BLP.  In this study, hearing impairment[2] (HI), as an example of a barrier to learning and participation, is selected to explore the relationship between the ASC and BLP in a comparative study involving two public school contexts in South Africa.  A major focus of this thesis is to ascertain how HI contributes to the ASC of South African learners, and whether learners with and without HI perceive their HI, or hearing ability, differently in different school contexts.  Additionally, as the ASC is influenced by many factors in many systems, the ASC of learners with HI may be an indicator of the congruency between the inclusive education and participation policy of South Africa and its implementation.

## 1.2    PROBLEM STATEMENT

The main question addressed in this thesis is, *What is the ASC of Grade Seven learners[3] with HI in the contexts of special and full-service inclusion schools*?  The following sub-questions are posed:

- In special and full-service inclusion schools, which role does HI play in the ASC of Grade Seven learners?
- What outcome(s) related to the ASC of the Grade Seven learner with HI could be regarded as indicative of successful conversion of primary schools to full-service inclusion schools?
- What guidelines could emerge to improve the conversion of primary schools to full-service inclusion schools in order to maintain and/or enhance the ASC of learners experiencing HI specifically, and BLP generally?

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[2] The reasons for selecting HI as the field of study are explained in Chapter 4 when the research design is addressed.

[3] Chapter 4 addresses the specific choice of Grade Seven learners as participants in the study.

## 1.3     AIM OF THE RESEARCH

The aim of the study is to investigate the ASC of learners with HI, (as an example of a barrier to learning and participation) in special and full-service inclusion school contexts. Understanding the ASC of Grade Seven learners with HI in different school contexts, will contribute to an understanding of whether and how the ASC of Grade Seven learners is indicative of the success of the conversion of primary schools to full-service inclusion schools for Grade Seven learners, and eventually possibly for other school grades.  The findings of the research might provide educationists, educational leaders, managers, and educators generally, with information as to what is required to improve the conversion of schools to full-service inclusion schools, and to minimise an inappropriate implementation of the South African inclusive education and participation policy from casting up additional academic, social and emotional barriers before thousands of learners with impairments already experiencing barriers to their learning and participation.

The investigation broadly entails administering ASC questionnaires to learners with HI in special and full-service inclusion schools, observing classroom interactions and conducting interviews with the principals, educators and learners with HI.

## 1.4     CLARIFICATION OF TERMINOLOGY

### 1.4.1   Orientation

Clarification of terminology is especially relevant when one engages in the inclusion – exclusion debate.  Slee (2001: 169) warned that "*we do need to examine the way in which the uses and abuses of language frame meanings that disable and exclude.  It is the problem of language and meaning that lies at the heart of the inclusive educational project.*"  His last statement is, of course, debatable.  For the purposes of this research, premature closure of meaning by definition is risky and can indeed lead to imprecise understanding (Kaplan, 1997: 113).  Instead of offering final definitions, the clarification of terminology offers only brief, preliminary and conditional descriptions to prevent major misunderstandings between the reader and the author.  Such descriptions are based on the notion of convergent reduction sentences which draw on open concepts to describe the meaning of a word (Hattie, 1992: 5-6).

1.4.2   Academic self-concept (ASC)

This notion will be explored more fully in Chapter 3, and here it is noted that *academic self-concept* refers to a person's self-perceptions of him- or herself as a learner and of the quality of his or her academic work (adapted from Marsh & Yeung, 1997b: 692).

1.4.3   Barriers to learning and participation (BLP)

The term is derived from *barriers to learning and development* (as used in the EWP 6, Department of Education, 2001) and *inclusion and participation* (Muthukrishna, 2000). According to the report on Quality Education for All (Department of Education, 1997: v, 12), the term *barriers to learning and development* refers to any obstacle that may hinder the learner from accessing educational provision and that may contribute to learning breakdown. Barriers to learning and development may be located within the learner, such as learning and visual impairment and emotional breakdown; within the school, such as learning through an additional language; within the education system; or within broader family, social, economic or political contexts.  Muthukrishna (2000) qualified the term *inclusion* with *participation* to stress the notion that inclusive education that provides access to schools without creating the opportunity to participate in the full range of school activities is not inclusive education at all.

*Barriers to learning and participation* (BLP), therefore, are obstacles within the learner, the school, the education system, and/or the broader family, social, economic or political contexts that may hinder the learner from accessing and participating in educational provision.  Learners who experience BLP are often referred to as *learners with special educational needs* (Department of Education, 1997: 11), although the term is unacceptable within the new framework of thinking followed by the Department of Education (Department of Education, 2002: 275).

1.4.4   Hearing impairment (HI)

*Hearing impairment* refers to any type (conductive, sensorineural, mixed or central) and degree and range (slight, mild, moderate, severe or profound across different speech frequencies) of hearing loss that a person may experience, whether the hearing loss is fluctuating, temporary or permanent, or bilateral or unilateral.  The hearing loss is to such an extent that it affects communication (Deaf Federation of South Africa (DEAFSA), n.d.; English, 1995: 19; Kapp, 1991b: 333-343; Smith, 1998b: 210-204; Watson, 1999a: 1-4).  HI is an example of a barrier to learning and participation.

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1.4.5   Inclusive education and participation

Inclusive education and participation is a system of education where learners who experience BLP, including impairments, are included in education in ordinary/regular schools in their neighbourhood in age-appropriate ordinary/regular classroom settings with other learners.  All learners are provided with support and instruction that meet their individual strengths and needs and allow for participation in the full range of school activities (based on Porter, 2003).

1.4.6   School contexts

*Context* refers to the circumstances wherein a person or an object is functioning (Plug, Meyer, Louw & Gouws, 1989: 187).  It follows that the school itself, as unit of study, can be understood better by considering the surrounding conditions, whether legislative, economic, educational and/or social, wherein the school is functioning and which may influence, and be influenced by, the dynamics of the school.  In this study, *school context* refers to the way of functioning of the type of public school as specified by South African policy and legislation, namely special, ordinary and full-service inclusion schools (Department of Education, 2001: 22; RSA, 1996b: Chapter 3(23-24)).

1.4.7   Special schools

Special schools are schools that provide specialised teaching and support outside the mainstream of education to learners with a moderate to severe degree of impairment or other BLP.  Currently in South Africa there are special schools for learners with visual impairment, hearing impairment, learning impairment, physical impairment, epilepsy, moderate and severe intellectual impairment, autism, hospital needs and behavioural disorders.

1.4.8   Ordinary schools/Regular schools

*Ordinary* schools are public schools that provide education in accordance with a policy-directed curriculum.  As stipulated in the South African Schools Act (RSA, 1996b: section 5(1)), "*a public school must admit learners and serve their educational requirements without unfairly discriminating in any way*".  Limited specialist support services are provided at some ordinary schools, often afforded by the parents.  Five years after the SASA the EWP 6 (Department of Education, 2001: 21) used the term *mainstream* schools when referring to

ordinary schools.  For some advocates of inclusion, *mainstream* refers to a time when learners were streamed according to ability; for others, no school is an ordinary school, as schools provide in the unique needs of their learners.  In order to minimise confusion and unconstructive debate, the term *regular* school will be used in this study.  The ultimate purpose of the education legislation in South Africa is that schools should be able to deal with all kinds of learners, and that the differences in school context will become less marked.

### 1.4.9   Full-service inclusion schools

*Full-service inclusion* schools are schools equipped and supported to provide for the full range of learning needs among all the learners, as envisaged by the EWP 6 (Department of Education, 2001: 22), therefore including learners who experience barriers of impairment.  In South Africa, only 30 primary schools countrywide have been selected to participate in the pilot phase of converting regular schools to full-service inclusion schools.  Once the pilot phase has been completed, the number of regular schools involved in the conversion will be expanded in accordance with lessons learnt and available resources (Department of Education, 2001: 43).  The term *full-service inclusion school* should be a temporary term in the transition to providing quality education for all, and will probably fall into disuse as the implementation of education policy progresses.

## 1.5     IMPORTANCE OF THE STUDY

The South African inclusion/exclusion debate is confounded with issues of human rights, ideology, policy and practice, and pragmatism, all substantiated with such results of studies done mostly in overseas countries.  As it was argued in 1.1 that the ASC of learners may be an essential criterion to establish the congruency between an inclusive education and participation policy and its implementation, an exclusively South African study to research the ASC of learners with impairment is required.  The study will contribute to the development of ASC theory and inclusive education and participation discourses not only in South Africa, but internationally, thus contributing to the emergence of clearer knowledge and praxis regarding ASC and inclusive education and participation.

## 1.6     OUTLINE OF THE CHAPTERS IN THE THESIS

In **Chapter 1,** the context of the South African inclusive education and participation policy has been looked at briefly.  The important role that ASC might play in determining the congruency between inclusive education and participation policy and implementation has

been posed, followed by the problem statement, aim of the research, clarification of terminology and the importance of the study.

**Chapter 2** presents the broad perspectives on the study, before presenting an understanding of special educational needs and barriers to learning and participation, focusing on HI. Different viewpoints to provide effective learning environments for learners who experience BLP are discussed, ending with the South African legislation and policy documents which attempt to create effective learning environments for all South African learners.

**Chapter 3** presents the different self-concept models, followed by the theoretical framework of the notion self-concept as used in the study, the development and change of the self-concept and an understanding of the ASC.  A South African notion of self-concept is contemplated, as well as the self-concept of learners with HI.

**Chapter 4** presents the research design employed to investigate the ASC of Grade Seven learners with HI in special and full-service inclusion schools, and includes the results of the pilot study.  A methodological grounding of the research is also presented, incorporating developing an ASC questionnaire, conducting interviews and making classroom observations.  Ethical principles adhered to during the study are also addressed.

**Chapter 5** reports the data collection and analysis, and results and findings.  The interpretation of the results and findings is an integration of a quantitative analysis of the ASC questionnaires, augmented by a qualitative analysis of the interviews and observations.

**Chapter 6** presents a summary of the research, the conclusions in respect of theory and practice, limitations of the research and recommendations for future research.