THE IMPLEMENTATION OF INCLUSIVE EDUCATION IN PRIMARY SCHOOLS IN THE LEJWELEPUTSWA EDUCATION DISTRICT

by

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DECLARATION

I declare that **the implementation of inclusive education in primary schools in the Lejweleputswa education district** is my own work and that all the sources that I have used or quoted have been indicated and acknowledged by means of complete references.

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DEDICATION

I would like to dedicate this study to my late mother, **PONKIE ALETTA LEBONA,** who always inspired me to pursue my goals and dreams in life through education.

Abstract

The drafting and promulgation of education policies bring hope and an expectation to those whose interests, concerns and problems, are addressed by them. On the other hand, such policies bring confusion, uncertainty and stress to teachers who are expected to implement and put into practice prescripts of those policies. Response to the *Education White Paper 6: Special Needs Education – Building an Inclusive Education and Training System* (2001) and subsequent policies on inclusive education which followed, brought uncertainty to teachers and also led to some developing a negative attitude towards inclusive education.

This study focused on the implementation of inclusive education in primary schools in the Lejweleputswa District of the Free State province. A literature review provided insight into the concept of inclusive education and moreover shed light on policy developments regarding learner diversity through the curriculum.

An empirical investigation using a qualitative approach was conducted and data was gathered by means of focus group interviews with school-based support teams as well as a questionnaire completed by principals. Furthermore, the findings of the empirical investigation concurred, to a large degree, with the findings of the literature study. In general, it was brought to light that inclusive education is not implemented correctly in primary schools in the Lejweleputswa District. Based on certain findings, recommendations are made regarding the successful implementation of inclusive education in primary schools.

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LIST OF ABBREVIATIONS

SBST	School-based support team
DBST	District based support team
FS	Free State
DoE	Department of Education
UNESCO	United Nations Educational, Scientific and Cultural Organisation
NCSNET	National Commission on Special Needs and Training
CAPS	Curriculum and Assessment Policy Statement
LSEN	Learners with Special Needs Education
SAHRC	South African Human Rights Commission
IDEA	Individuals with Disabilities Education Act
HIV/AIDS	Human/ Acquired Immune Deficiency Syndrome
LOLT	Language of learning and teaching
ECD	Early childhood development

CHAPTER 1

BACKGROUND, PROBLEM FORMULATION AND AIMS OF THE STUDY

1.1 INTRODUCTION

Inclusive education in South Africa did not develop in a vacuum. International movements in inclusive education and special needs had a distinct influence on current educational practices. In some countries, inclusive education is thought of as an approach aimed at serving children with disabilities within general education settings. Internationally, however, it is increasingly viewed more broadly as a reform that supports and welcomes diversity amongst all learners (UNESCO, 2007a). The development of specialised education in South Africa, however, has followed distinguishing trends in terms of political and philosophical influences over the past years (Swart & Pettipher, 2005:15). Special needs education in South Africa, where it is regarded as an integral part of inclusive education, is a sector of education where the previous segregation of learners on the basis of race was extended to incorporate segregation on the basis of disability (Department of Education: 2001).

1.2 BACKGROUND TO THE PROBLEM

In South Africa specialised education and support have predominantly been provided for a small percentage of learners with disabilities within 'special' schools and classes. Based on this and also other factors, the Minister of Education appointed in October 1996 the National Commission on Special Needs' Education and Training to investigate and make recommendations on all aspects of 'special needs and support services' in education and training in South Africa.

The National Commission on Special Needs Education and Training (NCSNET, 1998) reported the following central findings:

- Specialised education and support have predominantly been provided for a small percentage of learners with disabilities within special schools and classes;
- When provided, specialised education and support were provided on a racial basis, with the best human, physical and material resources reserved for whites;
- Most learners with a disability were either neglected by the system or they were mainstreamed by default;
- The curriculum and education system as a whole has generally failed to respond to the diverse needs of the learner population, resulting in massive numbers of drop-outs, push-outs and failures;
- While some attention has been given to the schooling phase with regard to special needs and support, the other levels or bands of education have been seriously neglected (NCSNET, 1998).

The report recommended that the South African education and training system should promote education for all and foster the development of inclusive and supportive centres of learning. These centres should enable all learners to participate actively in the education process so that they may develop and extend their potential and participate as equal members of society (NCSNET, 1998).

Based on the above, the Ministry of Education produced the *Education White Paper 6 on Special Needs Education: Building an Inclusive Education and Training System* (DoE, 2001) as an outline of its commitment to the provision of equal education opportunities. In this document the focus is particularly on those learners who experience or have experienced barriers to learning and development because of the inability of the education system to accommodate their learning needs.

1.3 STATEMENT OF THE RESEARCH PROBLEM

Outcomes based education was introduced in the nineties as a curriculum delivery approach to facilitate the transformation of the education system and to speed up the implementation of inclusive education. This was supposed to be achieved by transforming the entire education system in order to remove barriers to learning and development that a learner might encounter in a life-long learning career (Department of Education, 2007). The idea of the importance of a single system is emphasised by Engelbrecht, Green and Naicker & Engelbrecht (1999:14) when they state that the operational definition of inclusive education speaks of a single education system and the closure of the dual special/ordinary education system. This view is further emphasized by Ainscow, Booth and Dyson (2010: 25) when they note that developing and sustaining learning is premised on the recognition of equal entitlement of all children to education as their fundamental right. Exercising this responsibility involves ensuring that the education system creates equal opportunities for effective learning by all learners.

Since the publishing of the *Education White Paper 6* policy has already been legislated in 2001, and what had to follow was the crafting of a national plan of implementation. Currently there are numerous challenges and hurdles to effective inclusion of learners with special education needs into the mainstream of ordinary public schools. It seems that the full range of learning needs have thus far not been implemented sufficiently in schools as planned. Education structures in various education districts are not enabled, neither do attitudes, teaching and learning methods as well as the curriculum reflect inclusive values (Swart & Pettipher, 2005:18). This fact was also confirmed by the South African Human Rights Commission (SAHRC) who established during its public hearings conducted in 2007, that inclusive education in South Africa is not functioning. Their report suggested that there is a lack of access to education facilities for some learners with disabilities, anomalies in the spread of LSEN (Learners with Special Education Needs), physical barriers, and moreover teacher incompetence and under-confidence. They

concluded that the daily reality at school for many children is incongruous with the legislation and the policies of the Department. Their findings were corroborated by Eloff and Kgwete (2007) who mentioned a perceived lack of skills and competence as well as large classes and insufficient resources as two recurring themes pointed out by teachers in inclusive education.

1.4 RESEARCH QUESTIONS

The following research questions emanated from the preceding problem statement:

- What is the background to and nature of inclusive education in selected countries and in South Africa?
- Which policy developments took place since the *Education White Paper 6* was published?
- To what extent have the *Education White Paper 6* and subsequent guideline policies been successfully implemented in the Lejweleputswa Education District?
- Which problems are experienced by primary schools regarding the implementation of the policy?
- What recommendations can be made for the successful implementation of the policies?

1.5 PURPOSE OF STUDY

This study endeavoured to evaluate the current position on inclusive education and the inclusion of learners experiencing learning barriers in primary schools in order to assess whether the requirements set by the education authorities have indeed been met. Shortcomings will be highlighted in an attempt to find solutions to the problems of neglect and exclusion of learners with learning barriers from the mainstream education system.

1.6 RESEARCH AIM AND OBJECTIVES

The general aim of the study was to investigate the implementation of inclusive education in public primary schools in the Lejweleputswa District. In order to address the research questions stated above, the following objectives were realized by this study:

- to determine the background and the nature of inclusive education in selected countries and in South Africa;
- to verify which policy guideline developments took place since the *Education White Paper 6* was published;
- to determine the extent to which inclusive education has been implemented in public primary schools in the Lejweleputswa District;
- to establish which problems are experienced by primary schools regarding the implementation of the policy; and
- to make recommendations based on the research done aimed at a more sufficient implementation of inclusive education in primary schools in the Lejweleputswa district.

1.7 DEFINITION OF TERMS

1.7.1 Inclusive education and inclusion

UNESCO (2008) defines inclusive education as a process intended to respond to students' diversity by increasing their participation and reducing exclusion within and from education. Swart and Pettipher (2005:4) see inclusion as the development of an inclusive community and inclusive education systems. They emphasize the fact that it is about including everyone, regardless of ability, gender, language or disability, so that all learners can belong to a school and have access to the educational outcomes that schools offer. From these definitions it seems that inclusive education entails more than special needs and disabilities, and that it is concerned with comprehensive education and equality.

1.7.2 Special needs

"Special needs" is an umbrella term for a variety of diagnoses which are defined in many ways. Children with special needs may have mild learning disabilities or profound mental retardation, food allergies or terminal illness, developmental delays or minor to serious psychiatric problems. "Special needs" may also refer to the learning and educational needs of learners with disabilities (physical or mental) as well as those who have difficulty learning at the usual rate.

1.7.3 School-based support team

A school-based support team is a 'school-based' solution-finding group constituted by parents, teachers and other professionals which provides a forum for dialogue on the specific needs of students. Through the process of regularly scheduled meetings, classroom teachers are assisted with the development and implementation of instructional and/or management strategies to assist any learner who requires additional support (Free State Department of Education, 2003).

1.7.4 Education White Paper 6

Education White Paper 6: Special Needs Education: Building an Inclusive Education and Training system was released by the Department of Education in 2001. In this document a framework is provided for establishing an inclusive education and training system in South Africa with focus on the changes that are necessary for accommodating the full range of learning needs (Swart & Pettipher, 2005:18).

1.8 PRELIMINARY SURVEY OF RELEVANT LITERATURE

The Department of Education (DoE, 2008) states that the main objective of any education system in a democratic society is to provide quality education for all learners so that they will be able to reach their lives' objectives. With the publication

of the *Education White Paper 6* in 2001, South Africa has proclaimed its policy of inclusive education, the goal being the advancement of human rights as well as environmental justice. The national curriculum flowing from *Education White Paper 6* is particularly sensitive to diversity including poverty, inequality, race, gender, barriers to learning as well as language and age. Ainscow, Booth & Dyson (2010) argue that inclusive education should be understood as a basis of a new paradigm which bypasses the medical approach and the concept of academic deficiency, and which additionally promotes inclusive environments that embrace diversity.

1.8.1 Inclusion in a South African context

The context of education in South Africa is particularly complex because during the apartheid years, separate education departments existed for each of the four designated population groups, namely Blacks, Coloureds, Indians and Whites. This system was characterized by vast disparities in *per capita* funding in different education departments, as well as fragmentation and duplication of functions, responsibilities and services (Archer, Green & Pooler, 2002:29). The inequalities apparent in mainstream education were also reflected in special education by it being separated from the mainstream in terms of both service delivery and overall administration.

For those shaping education policy after 1994 it was priority to transform education by addressing the disparities and inequalities of the past and creating one system that could provide all learners with access to quality education. The *South African School Act 84 of 1996* (RSA 1996) emphasizes the right of all learners to appropriate education. In a parallel endeavour the international inclusive education movement increasingly desired to replace a charity or medical discourse about disability with a rights discourse. In South Africa, the rights of those with disabilities are highlighted in the *White Paper on an Integrated National Disability Strategy* (Department of Education 1997a). Khumalo (2008) points out that emphasis should be placed on system deficiencies and the need for the department to produce a policy position

paper setting out a comprehensive action plan, rather than on learners' difficulties. In their effort to reconstitute education, education policy makers in South Africa were made aware that the rights of learners vis-à-vis special educational needs, would have to be given due consideration. Swart and Pettipher (2005:16) state that, in line with international thinking, South African inclusive education activists argued for an education system that could accommodate the learning needs of diverse learners, including those with disabilities, in mainstream classrooms.

The White Paper on Education and Training and the South African School Act 84 of 1996 created the basis necessary for policy and legislation to facilitate a paradigm shift to inclusive education. In the *White Paper on an Integrated National Disability Strategy* (Department of Education, 1997a) strategies for access to the curriculum for learners with impairments were emphasized, consequently further stressing and supporting the paradigm shift from a medical model of disability to a socio-critical model that is based on the premise that society must change to accommodate the diverse needs of all its people.

1.8.2 Building an inclusive school

Swart and Pettipher (2005:19) as well as UNESCO (2008:18) identify the ultimate goal or purpose of building an inclusive school as a contribution towards the development of an inclusive society where all members of society are able to fulfil their potential and participate optimally, and where respect for and the valuing of diversity in the context of social integration is an active value.

When confronting the challenges of building an inclusive school current conditions must be taken into account. Prinsloo (2005:28) states that, as a result of South Africa's particular history of inequalities and discrimination and the context of recent social changes, most schools do not even have basic resources such as toilets, water, electricity or sufficient classrooms and they moreover experience a serious breakdown in the culture of teaching and learning. These factors should be viewed

as part of the challenges of inclusion because if they are not addressed, they will act as major barriers to learning and development which would ultimately result in the exclusion of many learners. Any effort at building an inclusive school must include the identification of specific priorities relating to particular needs within the context of building a culture of teaching and learning.

1.8.3 Parental involvement

Hallahan and Kauffman (2006: 51) admit that in terms of primary prevention, parents are the primary care-givers and little will be achieved in the prevention of health-related causes as well as basic social and emotional causes of disabilities and difficulties in learning, unless they become directly involved. Donald, Lazarus and Lolwana (2002:290) suggest that where learners have already developed disabilities or difficulties, it is essential to invite parents to be active partners in the whole process of secondary prevention to ensure that the problem does not worsen. Donald *et al.* (2002) further suggest that if inclusive education is to work in developing social contexts such as in South and Southern Africa, extra help and support may be required in the regular classroom as most disabilities and difficulties in learning require individual attention.

1.8.4 Challenges facing South African schools

Schools in South Africa are currently faced with enormous challenges with regard to their development. Many teachers feel threatened by the different practices introduced in the curriculum (e.g. first OBE, now CAPS) and inclusive education training initiatives. Becoming 'inclusive' is only part of the broader challenge of building a culture of learning and teaching where quality education becomes a reality. As a result of historical and other factors, schools are at different stages of development in this regard.

Already in 1999, Engelbrecht *et al.* (1999: 20) identified the following as some of the challenges facing South Africa‘s inclusive education endeavour:

- Complex diversified conditions in the nine provinces in South Africa
- Previously inherited disparate service provision
- Rural urban disparities
- Building inclusive classrooms

On the other hand, Swart and Pettipher (2005:19) outline the following elements of educational change and school reform that would help create an inclusive school:

- Vision and leadership – the establishment of a shared vision of preferred conditions for the future based on democratic and egalitarian principles of inclusion.
- Whole school development creates inclusive cultures and practices that permeate every aspect of the school and all its activities.
- Support and collaboration – focus on how to operate classrooms and schools as supportive and caring communities in which a sense of community - that everyone belongs - is accepted and supported by all.
- Attitudes – the inclusion of all learners becomes an issue related to everyone’s beliefs, values and attitudes about diversity, change and learning.
- Resources – teachers with experience of the inclusion of learners with disabilities have identified time, collaboration, administrative support and continued training as some of the resources for supporting and sustaining inclusive education in schools.
- Professional development – professional development prepares educators for collaboration and support, and assists them in understanding their relative roles and responsibilities in the inclusive effort.

While the current policies on inclusive education reflect the views of the majority of South Africans, the actual implementation of inclusive education is not easy since education is generally a conservative enterprise. In order to facilitate inclusion of all learners, the basic barriers to learning and development need to be addressed to ensure access to support by all.

1.9 RESEARCH DESIGN AND METHODOLOGY

1.9.1 Research design and method

The research design followed in this study was qualitative in nature with a preceding in-depth literature study to inform the nature and extent of the empirical investigation. Qualitative research focuses on people acting in natural settings and describing their world in their own words (Cozby, 2006:109). This research design facilitates an understanding of a social situation from the participants' perspectives (phenomenology). Leedy and Ormrod (2005: 133) point out that qualitative approaches focus on phenomena that occur in natural settings, i.e. in the real world and they involve studying those phenomena in all their complexity.

In this research the phenomenological method was selected as the most suitable for investigating the nature of special needs implementation at primary schools in the Lejweleputswa Education District. Hinckley (2005) state that from an interpretevist, phenomenological perspective, the typical characteristics of a qualitative research design is that it strives toward a holistic understanding of how participants relate, interact with and make meaning of a phenomenon. In the case of the present study, respondents gave a clear indication of the extent to which government policies on inclusive education are implemented as well as the difficulties they encountered in the process, since they deal with these policies on a daily basis.

1.9.2 Data collection strategies

1.9.2.1 Literature study

An extensive literature study was conducted by the researcher regarding the position of inclusive and special needs education in selected countries and particularly in South Africa. Important sources of data were books, circulars, relevant journals, articles, the *White Paper 6 on Inclusive Education* and subsequent policy guidelines published since 2001. The facts in the documents were interpreted to provide explanations of the past and to clarify collective educational meaning that may underlie current practices and issues (McMillan & Schumacher in White, 2005: 253). The overarching aim of the in-depth literature study was to provide a solid theoretical framework against which the findings of the empirical research would be reflected.

1.9.2.2 Focus group interviews

Focus group methodology is a way of collecting qualitative data which essentially involves engaging a small number of people in an informal group discussion (or discussions) focused 'around a particular topic or set of issues' (Wilkinson, 2004:177). Focus group research was used as it provides a way of collecting data relatively quickly from a large number of research participants. Focus group interviews are more natural (i.e. closer to everyday conversation) than an interview in that they typically include a range of communicative processes such as storytelling, joking, arguing, teasing, persuasion, challenge and disagreement. A moderator guides the interview while a small group discusses the topics that the interviewer raises.

The disadvantages of focus group interviews are, according to Gay, Mills and Airasian (2011:388), that the researcher has less control over proceedings, data is difficult to analyse and organising and recording are time consuming. According to

Steward, Shamdasani and Rook (2007:16) focus group interaction allows respondents to react to and build upon the responses of other group members, thereby creating a 'synergistic effect'. In this study the members of the School-based Support Team of the selected primary schools were engaged and their group discussion recorded, the data transcribed and then analysed using conventional techniques for qualitative data analysis. The researcher conducted five focus group interviews consisting of at least seven educators per focus group.

1.9.2.3 Questionnaires : Open-ended

Open-ended questionnaires with simple instructions were administered to school principals as an additional method of data collection. The main advantage of a questionnaire is that it is depersonalised and responses can be completely anonymous, allowing potentially embarrassing questions to be set with a fair chance of eliciting true replies (Gay *et al*., 2011:389). Open-ended questions were used as they allow the respondents to qualify and clarify their answers in as much detail as they wished, although it may lead to the collecting of worthless and irrelevant information.

Creswell (2012:206) states that one of the main disadvantages of the questionnaire is that the picture it paints is often static, with facts and views presented as more concrete and fixed than they may be in the dynamic flow of personal formation and social interaction. Questionnaires were personally distributed to the principals of the selected primary schools by the researcher. Recipients were courteously invited to complete it and they were further encouraged by an explanation of the purpose of the questionnaire, how the results could be of benefit to them and how little time it would take to complete. The principals of the selected primary schools completed the questionnaire. These respondents did not participate in the focus group interviews.

1.9.3 Pilot testing

Pilot testing is normally conducted to establish whether an instrument takes too long to administer and whether directions and items are clear (MacMillan & Schumacher, 2010:204). In this study pilot testing was conducted using both the focus group interview and the questionnaire to ascertain if any changes needed to be affected or whether more clarity was needed. A sample was located for this purpose. Modifications were done before the final data gathering process commenced.

1.9.4 Triangulation

According to Creswell (2012:536) triangulation is widely considered as a process which uses multiple perceptions to clarify meaning and verify the repeatability of an observation or interpretation. There are different types of triangulation. Triangulation of data collection methods which refers to the interpretation of findings from both the focus group interviews and open-ended questionnaires, was used in this study. This facilitated the verification and validation of the findings.

1.9.5 Quality criteria

Trustworthiness

According to Gay *et al*. (2011:392) the term trustworthiness refers to the way in which the inquirer is able to persuade the audience that the findings in the study are worth paying attention to and that the research is of high quality. In the present study the researcher aimed to achieve these goals by employing member checking. After data analysis and before findings were drawn, participants and respondents were furnished with interpreted results to verify the correctness of the interpretations.

Credibility

The researcher established credibility by applying triangulation to the methods of data collection and data analysis. In so doing, he determined if there are any discrepancies in the findings. He strived to produce findings that are convincing, which includes presenting inconsistent and negative findings in order to add to the credibility of the study.

1.9.6 Population and Sampling

The population of this study comprised principals and school-based support teams of the selected primary schools in the Lejweleputswa education district. Five primary schools were selected by means of purposive sampling to participate in the study. Purposive sampling involves the researcher who should select what he/she thinks is a 'typical sample' (Walliman, 2005:279). Particular cases (primary schools) were chosen. Strydom and Delport (2005) explain that, in purposive sampling, the researcher should first think critically about the parameters of the population and choose the sample cases accordingly. In this study, the researcher first investigated which primary schools (participants) would provide rich detail so as to maximise the quality of information that was to be obtained.

1.9.7 Data analysis

The researcher immersed himself in the data in order to become familiar with the information. A content analysis was performed: data gathered from the focus group interviews and questionnaires was organized, transcribed (in case of the focus group interviews), segmented and coded. From the various codes, themes or categories were established inductively to facilitate interpretation and presentation of findings.

1.10 ETHICAL CONSIDERATIONS

Social research and other forms of research which study people and their relationships to each other and to the world, need to be particularly sensitive about issues of ethical behaviour (Walliman, 2005:340). In research certain actions can be referred to as unethical and others as ethically acceptable. The following ethical measures were taken into account during the research:

1.10.1 Professional ethics

According to Creswell (2012:277) professional ethics refers to the moral commitment that scientists are required to make to acquire objective and accurate data about real phenomena. This research was conducted ethically for the following reasons:

- The researcher endeavoured to be objective in reviewing literature and obtaining data.
- The researcher endeavoured to refrain from falsification and/or fabrication of data.
- The researcher in all cases endeavoured to describe the methodology used to obtain data.

1.10.2 Publishing ethics

Auricombe and Mouton (2007) state that one of the key ethical principles of scientific publication is that one must acknowledge sources. This research was done in compliance with publishing ethics:

- Quotes of all authors used in this document were properly acknowledged in a list of references.
- All other written work was free of plagiarism and flowed from the researcher's pen.

1.10.3 Accountability

The research and its results were conducted in an open and transparent manner and results were accessible. This was achieved in the following manner:

- Full permission from the Free State Department of Education was gained to conduct the research at selected primary schools in the Lejweleputswa district.
- Research results were open and available to all.

1.10.4 Relationship with subjects

Respondents have the right to privacy and anonymity at all times. McMillan and Shumacher (2010:338) explain privacy and anonymity as the individual's right to decide when, where, to whom and to what extent his or her attitudes, beliefs, and behaviour will be revealed. The following measures were taken in this study:

- The anonymity and privacy of respondents were respected at all times. Subjects had the right to have their viewpoints expressed.
- A summary of the rationale of the research project was explained to respondents at the beginning of the focus group interviews as well as in the cover letter to the questionnaire.

1.10.5 Publication of results

The findings of the study will be introduced to the reading public in written form to be of value and to be viewed as research (De Vos, 2005: 65):

- The report written as a result of this investigation is clear and unambiguous to ensure that whoever uses it, can rely on it.
- A shortened version of this research will be submitted as a journal article to an

accredited publisher.

1.11 POSSIBLE LIMITATIONS OF THE STUDY

It is important to note that there are limitations to the qualitative research design, one which is that research quality is heavily dependent on the individual skills of the researcher and it is more easily influenced. Hinckley (2005) adds that it may also be time-consuming and the research might generate large quantities of data that the researcher may find hard to analyse. Even though this is often characteristic of interpretivist studies, it was not the case with this study.

1.12 DELIMITATION OF STUDY

This study focused entirely on public primary schools in the Lejweleputswa District to make data gathering and interpreting more manageable.

1.13 CHAPTER DIVISION

In ***chapter one*** the problem and the aim of the study was demarcated. The rest of the research evolved as follows:

In ***chapter two*** a brief historical overview on previous developments and initiatives overseas and in South Africa that led to the gestation of the *White Paper 6 on Special Needs Education: Building an Inclusive Education and Training System* (DoE, 2001*),* is presented. An account is also provided of follow-up initiatives and policy development since 2001.

Chapter three provides an explanation of the research methodology and design used to conduct the investigation.

In ***chapter four***, based on the data collected, the findings are presented and an analysis and interpretation of the data is discussed.

In ***chapter five*** a summary of the findings and conclusions are given. Some recommendations are offered to a more effective implementation of the *White Paper* 6 *on Inclusive Education: Building an Inclusive Education and Training System* in public schools in the Lejweleputswa District.

1.14 SUMMARY

This chapter discussed the background to the problem, which is the observation that South African schools are not as yet fully inclusive and they may be reluctant to adopt and implement inclusive education policies as outlined in *Education White Paper 6.* The researcher found it necessary to establish whether inclusive education is implemented in selected primary schools in the Lejweleputswa education district. Consequently, the chapter also provided a problem statement in the form of research questions, the objectives, the methodology to be followed and the delineation of the study.

A literature review, providing a conceptual framework for the study, is conducted in the next chapter.

CHAPTER 2: LITERATURE REVIEW

2.1 INTRODUCTION AND ORIENTATION TO THE STUDY

Inclusive education can be defined as a system of education that is responsive to the diverse needs of learners with particular focus on developing an inclusive community and education system that is based on a value system that invites and celebrates diversity arising from gender, nationality, race, language, socio-economic background, cultural origin and level of education achievement (Mittler, 2000:14). Booth (2005:25) points out that inclusion in education can be defined as two linked processes: First, It is the process of increasing the participation of learners in and second, reducing their exclusion from the curriculum, cultures and communities of neighbourhood mainstream centres of learning.

Although inclusion is about more than special needs or disabilities and is concerned with comprehensive education, equality and collective belonging (Thomas & Loxley, 2001:118), it is noteworthy that much of the literature consulted use the terms 'inclusion' and 'special needs' (with the focus on disabilities) intermittently. In most cases special needs, as a sub-category of inclusive education, seem to be the focal point and the researcher therefore assumes that emphasis in inclusive education is placed on special needs and disabilities in particular due to the extent of the problem. However, from the definition of inclusive education above, it is clear that inclusion is about including *everyone*, regardless of ability, gender, language or disability, so that all learners can belong in mainstream schools and have access to the educational outcomes on offer.

Mitchell (2005:4) identifies the following as principal features of inclusion:

- Entitlement to full membership in regular, age-appropriate classes in their neighbourhood schools;

- Access to appropriate aids and support services and individualized programmes with appropriately differentiated curriculum and assessment practices.

These would mean that inclusive education seeks ways to make children with special educational needs participate actively in regular education. It is about valuing diversity and individual differences, and ensuring equality and access for all. In the same vein, Deiner (2005:24) points out that effective inclusion involves 'placing children in an education setting that provides the support that meets children's emotional, social and educational needs'. Inclusion may therefore be regarded as the process whereby all children, including those with special educational needs (SEN), receive their education in the mainstream with structures in place to ensure participation and progress.

According to UNESCO (2005:13-14) inclusion is seen as a process of addressing and responding to the diversity of needs of all learners through increasing participation in learning, cultures and communities, and reducing exclusion within and from education. It involves changes and modifications in content, approaches, structures and strategies, with a common vision which covers all children of the appropriate age range and a conviction that it is the responsibility of the regular system to educate all children. Inclusion is concerned with providing appropriate responses to the broad spectrum of learning needs in formal and non-formal educational settings. Rather than being a marginal issue on how some learners can be integrated into the mainstream system and other learning environments in order to respond to the diversity of learners, it aims towards enabling both teachers and learners to feel comfortable with diversity and to see it as a challenge and enrichment, rather than a problem (UNESCO 2005:13-15).

This chapter dwells on literature which provides a theoretical framework for the study. The main focus of the chapter is on inclusion in the South African context and the policy development after 1994 in post-apartheid South Africa. Much emphasis is

placed on the flagship of inclusive education in South Africa: *White paper 6: Special Needs Education: Building an Inclusive Education and Training system* (DoE 2001) and subsequent policies and guidelines following the implementation of *White Paper 6* in schools and classrooms. The chapter starts out with the historical background of inclusive education after which an overview of the current situation in selected countries is also provided. The existing situation with regard to inclusive education in South Africa is explored on national, provincial, district and school level. The chapter further identifies inclusive education practices in the classroom and some practical implications of inclusion on teaching, learning and assessment are additionally discussed. It concludes with the challenges faced by inclusive education practitioners in South Africa.

2.2 HISTORICAL BACKGROUND OF INCLUSIVE EDUCATION

Tremblay (2007:2) states that historically people with disabilities were often placed in hospitals, asylums, or other institutions that provided little, if any, education. During the era of extermination in Greece, disability was seen as “punishment of the gods” - hence as bad or an evil sign. Among the many great pioneers in special education, the contribution of Ovide Decroly (1871-1932) is noteworthy. Tremblay (2007:13) states that Decroly, who was a Belgian teacher and psychologist, founded a school for children with mild disabilities (behavioural disorders, learning disabilities, light mental retardation) in 1901 and he gradually invented his pedagogy for these children. In 1907 he founded a school for “ordinary” children with the same pedagogy, based on the following 4 fundamentals:

- Hobbies and interests of the child guides the education;
- Taking cognisance of globalisation, which means that the child learns globally, without order. A complete picture must be presented to the child followed by particulars and analysis;
- The class workshop or class laboratory is where the child lives and works, which is everywhere;

- Recognition of the importance of a natural environment that places the child in a situation of discovery (Tremblay, 2007:27).

Historically children with disabilities have been treated as “invalid” or inferior and in need of very special protection, and viewed as essentially incapable to benefit from education. This conceptualisation led to exclusion and the construction of institutions to accommodate these children. Later on a belief took root that all children belonged in the same school system and should not be separated. The parallel system to traditional schooling that developed came to be known as Special Education, and further refinement of this system became known as Special Needs Education. Special Needs Education can be defined as a system of education for children with disabilities within ordinary schools as it directly represents an effort to provide education in more ‘normal’ settings. A typical characteristic of this provision of education is that it has been offered in special classes and not in cooperation with other children in the mainstream education.

Gradually, during the twentieth century, voices arose asking for integration in education, thus shifting the focus to integration. Integration was initially understood to be a gradual reform of the special education system, without changing the ideology underpinning the system which advocated provision of education in special classes. In an attempt to provide education to children with disabilities, principles of mainstreaming and integration were put in practice. According to Turnbull, Turnbull, Shank, Smith and Leal (2002:77) the goal of mainstreaming was to return learners with disabilities to the mainstream of education as much as possible, alongside normally developing peers. Most of these children were still enrolled in self-contained special classes. Swart and Pettipher (2005:7) posit that, in contrast to mainstreaming, the goal of integration was (and still is) to ensure that learners with disabilities are assigned equal membership in the community. Frederickson and Cline (2002:65) state that a further aspect that differentiated mainstreaming from integration was that special services followed the learner to the school. However,

only a limited number of additional provisions were made and the onus was still on the learner to “fit in”.

For decades special schools have been the pivot of education for learners with special needs. In quite a number of countries in the western world, including South Africa, educators and administrators have put a great deal of effort into the development of a thorough and widely accepted system of special schools. Because of the unusual, special instructions provided in these schools, many function as separate, independent schools. The separate system used to be seen as an expression of the core for learners with special needs. However, this view of special education has gradually changed as the segregation of these learners with special educational needs is now perceived as unacceptable. The prevailing view is that they should be educated together with their peers in regular education settings. The idea of inclusive education was given momentum by two conferences organised under the auspices of the United Nations. The first of these, held in Jontien, Thailand in 1990, promoted the idea of education for all; this was followed in 1994 by a UNESCO conference in Salamanca, Spain, which led to a statement that is still being used in many countries to review their education policies. The *Salamanca Statement* proposed that the development of schools with an inclusive orientation is the most effective means of improving the efficiency and ultimately the cost-effectiveness of the entire education system (Booth & Ainscow, 2002:13).

According to Tremblay (2007:43) the right to a more inclusive education is covered in several significant international declarations, including the:

- Universal Declaration of Human Rights -1948
- UN Convention on the Rights of the Child (1989)
- World Declaration for Education for All (1990)
- Standard Rules on the Equalization of Opportunities for Persons with Disability (1993)
- UNESCO Salamanca Statement and Framework for Action (1994)

- Dakar Framework for Action (2000)

2.2.1The UNESCO Salamanca statement and subsequent policies

In 1994 over 300 participants, including representatives of 92 governments and international organisations, met in Salamanca, Spain, with the purpose of furthering the objectives of inclusive education. The resulting *Salamanca Statement* (UNESCO, 1994) was framed by a rights-based perspective on education. According to UNESCO (1994) the underlying purpose of the meeting in Spain was to further the aim of Education for All by considering what basic policy changes are needed to promote inclusive education, so that schools can serve all children, particularly those with special educational needs. They agreed on a dynamic new statement on the education of all disabled children which called for inclusion to be the norm. In addition, the conference adopted a new Framework for Action guided by the principle that ordinary schools should accommodate all children, regardless of their physical, intellectual, social, emotional, linguistic or other conditions. Tremblay (2007:44) argues that the *Salamanca Statement and Framework for Action on Special Needs Education* is based on the premise that every child has a fundamental right to education and has unique characteristics, interests, abilities and learning needs.

2. 2.1.1 Education for all (EFA)

The *Salamanca Statement* called for a commitment to Education for All through recognising the necessity and urgency of providing education for all children, young people and adults 'within the regular education system.' It proposed that those children with special educational needs 'must have access to regular schools' and further asserted that:

> “Regular schools with this inclusive orientation are the most effective means of combating discriminatory attitudes, creating welcoming communities, building an inclusive society and achieving education for all; moreover, they provide an effective

education to the majority of children and improve the efficiency and ultimately the cost-effectiveness of the entire education system. (Article 2, UNESCO, 1999:5)".

2. 2.1.2 Call to governments

The *Salamanca Conference on Special Needs Education: Access and Quality* identified the following as obligations of all governments in an attempt to further the purpose of inclusive education:

- To give the 'highest policy and budgetary priority' to improve education services so that all children could be included, regardless of differences or difficulties.
- To adopt as a matter of law or policy the principle of 'inclusive education' and enrol all children in ordinary schools unless there were compelling reasons for doing otherwise.
- To develop demonstration projects and encourage exchanges with countries that have inclusive schools.
- To ensure that organisations of disabled people, along with parents and community bodies, are involved in planning and decision-making.
- To put greater effort into pre-school strategies as well as vocational aspects of inclusive education.
- To ensure that both initial and in-service teacher training addresses the provision of inclusive education (Article3, UNESCO (1994:ix).

2.2.1.3 Inclusive schooling

The *Salamanca Statement* also called on the international community, particularly on UNESCO, UNICEF,UNDP and the World Bank, to endorse the approach of inclusive schooling and to support the development of special needs education as an integral part of all education programmes (UNESCO,2009:32). As for the United Nations and

its specialised agencies, the *Salamanca Statement* demanded that they 'strengthen their inputs for technical co-operation' and improve their networking for more efficient support to integrated special needs provision. Non-governmental organisations were requested to strengthen their collaboration with official national bodies and become more involved in all aspects of inclusive education. According to Tremblay (2007:44) the *Salamanca Statement* declares that regular schools with an inclusive orientation provide for the most effective means of combating and preventing discriminative attitudes and the building up of an inclusive society. Lipsky and Gartner (1997:258) state that the *Salamanca Statement and Framework for Action on Special Needs Education* will for many years to come provide a benchmark for measuring progress in schools with regard to inclusion of learners with disabilities.

As the United Nations agency for education, UNESCO was asked to:

- Ensure that special needs education forms part of every discussion dealing with Education for All.
- Enhance teacher education in this field by getting support from teacher unions and associations.
- Stimulate the academic community to do more research into inclusive education and disseminate the findings and the reports.
- Use its funds over the five-year period, 1996-2001, to create an expanded programme for inclusive schools and community support projects, thus enabling the launch of pilot projects (Article 4, UNESCO,2009:xi).

2.2.1.4 International Conference on Education and its reports

Inclusive Education: the way of the future was the theme of the 48th session of the International Conference on Education (ICE) which was held in Geneva from 25 to 28 November 2008 and organised by UNESCO's International Bureau of Education. This conference gathered ministers of education and other stakeholders from the whole world for a dialogue on inclusive education with respect to the policy,

implementation and challenges in various contexts and all levels and forms of education. The key challenges identified were to build more inclusive, just and equitable societies by developing quality education systems that are more inclusive and responsive to the tremendous diversity of people's learning needs throughout life.

The International Conference on Education (UNESCO, 2008:22) agreed amongst others that:

- Inclusive education must be based on the principle of education as a human right, since it implies that all individuals should be given the opportunity to achieve to their maximum capacities and educational potential regardless of their abilities.
- Although inclusive education should in part be a quantifiable objective, it must be achieved through a transformative process that changes the fundamental approach at the school by embracing diversity as a positive stimulus that encourages learning.
- Because the inclusive model of education is complex and requires more time to be implemented effectively, strategies based on political dialogue are indispensable, as is the development of medium- and long-term policies based on a broad consensus and agreements.
- Governments must commit resources if inclusive education is to succeed. Priority must be given to the most critical of elements, for example establishing adequate infrastructure, developing teacher competencies, and implementing suitable pedagogies.
- Fostering inclusion implies active collaboration of all social actors, including state, private sector and civil society. Emphasis was placed on formal and informal education opportunities and the importance of embracing diversity in both these environments.
- It was also deemed essential to improve teacher competences, training and working conditions (UNESCO, 2008).

All countries were called upon to adopt and ratify international conventions related to inclusion, and in particular the *Convention on the Rights of Persons with Disabilities* which was first adopted in December 2006. Finally, UNESCO was recognised for playing the leading role in advantaging inclusive education by promoting the exchange and dissemination of best practices, providing advice to countries on developing and implementing policies, encouraging South-South and North-South-South cooperation levels, and making special efforts to assist developing nations affected by conflict as they implement these recommendations (UNESCO, 2008:15).

2.3 INCLUSIVE EDUCATION IN SELECTED COUNTRIES

The application of an inclusive education policy challenged all nations to provide quality education for all learners, including those with special needs (Kuyini & Desai, 2007:104). However, each government interprets intervention, guidance and ultimately national policies on inclusive education in terms of its own history, traditions, values and structures. The way in which inclusive education is implemented internationally, also has a distinct influence on inclusion policy implementation in South Africa. What follows is a brief overview of inclusion in a few countries.

2.3.1 Inclusive education in Sweden

Inclusive education in Sweden is considered within the social model of disability which shifts the focus from medical to social intervention, as is the case in South Africa. Booth (2005:14) points out that the social model moves from the premise that barriers arise because of the interaction between people, i.e. learners at school and their environments. These environments have a direct influence on the progress of learners, including *inter alia*, policies and cultures, infrastructures, social and economic status.

In an attempt to move away from special schools, Sweden and other Scandinavian countries have long adopted an active policy of inclusion and integration of persons with disabilities in their society and schools. Flem and Keller (2008:198) state that Scandinavian countries use terminology such as ‘comprehensive schools’ and ‘common schools for all that suit every child. Moen, Nilssen and Weidmann (2007:284) point out that in terms of Swedish national legislation, which has been part of the education system, all schools for all children must be inclusive. Furthermore, Michailakis (2001:146) explains that previous changes in inclusive education in Sweden consisted of reforming the special education system so that its services and programmes could be extended to regular schools. This would lead to the creation of a unitary education system that responds to special needs in education of Swedish children with particular emphasis on regular education for learners with special needs.

Based on Sweden’s progress on policy formulation around inclusive education, many believe that the vast majority of Swedish learners with disabilities attend mainstream schools, however, some concerns are still raised that the aspirations of inclusive education have not been met in all learners. Persson (2008:342) asserts that the goal of inclusion in Sweden, i.e. to allow all learners to attend mainstream schools, has not been matched by developments in practice at school level. This view is supported by Jerlinder, Danermark and Gill (2010:47) who point out that evidence of this trend of mismatch between inclusive education aspirations and developments in practice at school level, is an increase in placement of learners in special schools.

2.3.2 Inclusive education in Australia

The educational system in Australia is the responsibility of individual state jurisdictions and territories. Consequently, each jurisdiction has its own education act and establishes its own agenda regarding the education of learners with special needs. Whereas there are many similarities between the content of individual acts, the options for the education of learners varies quite considerably, due to the

autonomy of decision-making within each authority. The geographical vastness of the continent also impacts enormously on the availability of school options with many children being unable to attend a traditional local community school (Forlin, 2005:13).

2.3.2.1 Historical perspective

School systems in Australia began to establish a large number of segregated special schools between the 1940s and 1970s to cater for learners with specific disabilities. Public school systems, though, provided only for learners who were deemed to be 'educable' or 'trainable', and during this period many children with profound support needs were not offered places even in special schools (Loreman, Deppler & Harvey, 2005).

In the 1970s, while acknowledging the recommendations of the Karmel Report and international declarations that were enacted on the rights of the children, discussions commenced about increasing regular class placements for children with disabilities. It was not until 1981 that the first major attempt to promote greater acceptance and integration of people with disabilities occurred on a large scale in Australia (International Year of Disable Persons). By the end of 1981 every jurisdiction in Australia had a policy on learners with disabilities and albeit slowly, the idea of integration was beginning to become a reality in schools (Carroll, Forlin & Joblin, 2003:71). Since then there has been a parallel and increasing momentum towards integrating people with disabilities into the mainstream of all aspects of society.

Some states, such as Western Australia (WA), for example, established special education facilities called Education Support Centres (ESC) on the site of regular schools in an attempt to encourage closer interactions between their learners. These ESCs are autonomous with a separate principal and teaching staff and rely on both staffs collaborating to establish their own integration program. The integration of learners with disabilities still occurred in 2006 in most states in Australia, with the

degree and outcome being quite varied as it continues to rely upon arrangements at each school site.

This shift was followed by the mainstream era. In Australia learners with disabilities and others defined as having special educational needs are currently increasingly registered in their local regular schools, but they may be withdrawn for parts of the school day to receive intensive intervention programmes by a specialist support teacher. This option is usually determined by the school, i.e. the school has to decide whether it is able to provide for a learner before offering a mainstream placement.

Following the support for the *Salamanca Statement* (UNESCO, 1994) the focus of education has gradually changed towards the inclusion movement that acknowledges that schools should support all children in their district regardless of their differences, thus reflecting a normative balance of cultural, racial, ethnic and ability levels. This view opposes the mainstream approach which considers *whether* they could offer appropriate accommodation for a learner rather than *how* they could do so.

The most recent statistics compiled in the Report to the Minister for School Education from the Australian *Government Productivity Commission (2010)* reflects that 4,6 percent (157,4860) of school learners are reported as having disabilities, comprising a total of 125,216 enrolments in government schools (which is 5.5 % of all learner enrolments in government schools); and a total of 32,270 enrolments in non-government schools (which is 2,8% of all learner enrolments in non-government schools).

2.3.3 Ghana's experience with inclusive education

2.3.3.1 Disability in Ghana

In Ghana inclusive education also tends to focus on special needs to the exclusion of other broader, inclusive ideals. In stark contrast with the inclusion policies of Sweden and Australia, it seems that Ghana still identifies in practice more with the medical model of special needs. Significant efforts to integrate learners with special needs in mainstream education are not priority – rather, a community view of integrating persons with disabilities into the economy and broader community is aimed for. The focus is still much on disability to the exclusion of inclusive education as such. Gyimah (2006:5) states that disability is viewed in Ghana from two perspectives which are the categorical diagnosis of specific disabilities, and the non-categorical analysis of functional characteristics. A distinguishing feature of the *categorical diagnosis* of specific disabilities is that it leads to the assignment of diagnostic labels. This particular diagnosis provides a traditional perspective on persons with disabilities which focuses on the etiology of cognitive, behavioural and physical impairments. This type of diagnostic information has been used most frequently in determining treatment and placement decisions.

On the other hand, the *non-categorical analysis* of functional characteristics is not concerned with causality, as is the case with the more medically oriented diagnostic model, but it rather considers how disabilities affect the intellectual and behavioural functioning of individuals. Degrees of impairment across intellectual and behavioural functioning areas are analysed along with the assessment of specific skills, leading to the development of individualized educational goals and instructional programming.

The National Council on Persons with Disability was formed to oversee provisions for the disabled. Its main objective is to propose and evolve policies and strategies to enable persons with disabilities enter and participate in the mainstream of the

national development process (Republic of Ghana, 2006). The government is to seek regulatory measures to promote an enabling environment for the total integration of persons with disabilities into society. The policy seeks to present government strategies for mobilising and integrating persons with disabilities into the mainstream of the socio-economic life of the communities in which they live, and by so doing, ensuring that persons with disabilities contribute to achieving the national vision of poverty reduction and improvement of their living conditions.

In order to realise the vision of inclusion, the country has embarked on various pilot projects under the direction of the Special Education Division (SPED) of the Ministry of Education. Since 2003 the SPED has targeted a number of regions in the country to pilot inclusive education programmes. It is currently not clear to which extent the implementation of inclusive measures in education has been successful (NDSP, 2011).

Gyimah (2006:5) states that whilst Ghana is doing its best to provide inclusive education, it is still faced with challenges such as a lack of comprehensive and multi-disciplinary assessment practices, poor parental involvement and community participation, inadequate central government and district assembly funding as well as poor teacher competence in adapting the physical environment and curriculum to meet the needs of the disabled learners in educational settings.

2.3.4 Special needs and inclusion in Tanzania

Special needs education in Tanzania was developed and supported by efforts of non-governmental and religious organisations. The first school for the blind (Blind Boys) was established by the Anglican Church, and the Roman Catholic Church started the first school for deaf children while services for persons with physical disabilities were provided by the Salvation Army. Mmbaga (2002:19) explains that the historical development in special needs education in Tanzania followed the development in most other countries, i.e. services for certain disability groups (the

blind and the deaf) were provided by churches and charity organisation followed by small-scale educational provision in special schools for other disability groups, e.g. persons with physical and intellectual disabilities.

2.3.4.1 Legislation and policy

According to Mmbaga (2002:21) it appears that before 1995 Tanzania had neither specific legislation on inclusive education, nor an approved special needs education policy. The Universal Primary Education Policy of 1974 emphasises the right of all Tanzanian children to a free primary education and this policy is often cited to justify provision for children with special education needs. The Compulsory Education Act of 1978 made education for all school age children between the age of 7 and 13 compulsory which reinforced the notion of primary education as a human rights issue. As a result of the revision of the education policy, the Education and Training Policy was passed which states that every child has a right to proper primary education as a human right regardless of sex, colour, ethnicity and abilities. This general education policy statement indicates that people with disabilities have the same rights as everyone else and it furthermore acknowledges their right to special educational programmes (Mmbaga, 2002).

2.3.4.2 Current situation

According to Commins (2005:31) there is a gradual shift in Tanzania's national curriculum from highly subject or content-based formats to competency based formats in structure and assessment, although continuous assessment is less valued than terminal examination. Most special needs education services are provided at primary school level in residential (boarding) and non-residential special schools. These non-residential special schools include both government schools and schools supported by humanitarian organisations and churches. Special needs education is offered in 18 special schools of which the majority are residential schools as well as specials units integrated into regular schools.

2.3.5 Inclusive education in the Netherlands

2.3.5.1 Freedom of education

According to Thijs, Van Leeuwen and Zandbergen (2009:18) one of the key features of the Dutch education system, guaranteed under article 23 of the Constitution, is freedom of education. This refers to the freedom to found schools (freedom of establishment), to organise the teaching in schools (freedom of organisation of teaching) and to determine the principles on which they are based (freedom of conviction). People have the right to found schools and to provide teaching based on religious, ideological or educational beliefs. As a result there are both public and private schools in the Netherlands.

Public schools are open to all children regardless of religion or outlook and they provide education on behalf of the state. Public schools are subject to public law. They are governed by the municipal councils or by a public legal entity or foundation set up by the council. The obligation to attend school is laid down in the Compulsory Education Act of 1969. Every child must attend school full time from the first school day of the month following his/her fifth birthday; in practice, however, nearly all children attend school earlier (Thijs *et al.,* 2009).

In 1998 the law on the Expertise Centres was introduced and ever since schools for children with learning and behavioural difficulties and children with moderate learning difficulties, have been converted into special primary schools (Boswinkel & Van Leeuwen, 2008). This law came into effect in 2003 and as a result regional expertise centres (RECs) were set up, i.e. consortiums of special schools and secondary special schools within a district. According to Boswinkel and Van Leeuwen (2008:10) these consortiums are divided into the following four clusters:

- Cluster 1: education for the visually handicapped (formerly schools for the blind and partially sighted);
- Cluster 2: education for learners with hearing impediments or communicative handicaps (formerly schools for deaf or hearing-impaired learners with severe speech disorders);
- Cluster 3: education for physically, mentally and multi-handicapped learners, and for chronically sick children;
- Cluster 4: education for learners with behavioural disorders (formerly schools for severely maladjusted children, chronically sick children and learners in paedological institutes).

2.3.5.2 Educational reforms addressing inclusive education

McKenny, Letschert, and Kloprogge (2007:49) outline the following policy measures that have been taken to enhance inclusive educational for all learners:

- The provision of appropriate education - a policy that gives the responsibility to the school boards to provide each pupil with the care that he needs, through collaboration at regional level;
- A weighting system through which schools receive additional funds in order to support learners with educational disadvantages, especially in the domain of literacy and numeracy development;
- Reforms to increase participation of learners in early childhood programmes;
- Policy initiatives to strengthen the quality of education for all learners;
- Policies aimed at reducing the number of early school leavers.

2.3.5.3 Quality of special needs education

Thijs *et al.* (2009:50) posit that there are many mainstream schools which include learners with special educational needs in regular classes as well as mainstream schools with special classes for children with special needs. Some mainstream schools specialize in target groups and some mainstream schools collaborate intensively with special schools. Another important issue in the Netherlands is the quality of education for learners as well as learners with special educational needs, irrespective of the place where education takes place: in regular schools, in special schools or a combination of both. More attention is paid to learning outcomes, especially pertaining to language development and mathematics. There are several initiatives to enhance curricular frameworks, material resources and capacity building in schools. Besides the well-being of learners, cognitive development becomes increasingly important in special needs education.

2.3.5.4 Challenges

McKenny *et al*. (2007) identify the following as challenges that the Dutch Education Departments face towards full inclusion of learners with special needs:

- To reduce the number of learners with special educational needs who are referred to special schools.
- The current policy to integrate more learners with special educational needs in mainstream education calls for tailor-made curricula which requires much from schools and teachers.
- A different approach needs to be followed by schools with regard to the way they design and implement the curriculum for learners with special educational needs which would additionally impact on the tasks and the responsibilities of the people who are involved in this process.

2.3.6 Inclusive education in the United States of America

A working definition of inclusion in the United States is the practice of merging learners of various mental and physical ability levels into one classroom to meet individual learners' educational needs (Sapon-Shevin, 2007). Special education programmes in the United States were made mandatory in 1975 when the United States Congress passed the *Education for All Handicapped Children Act* (EHA) in response to discriminatory treatment by public educational agencies against learners with disabilities. The EHA was later modified to add protection to people with disabilities and renamed the *Individuals with Disabilities Education Act* (IDEA).

Rorabaugh (2008:16) points out that from the earliest days of school busing driven by civil rights movements to the myriad of curricular reform that was evident in the late 20th century, the United States has attempted to meet the needs of varying ethnic groups and learner differences under the umbrella of inclusion. Despite the desire expressed in the Declaration of Independence with its backbone phrase "with liberty and justice for all", exclusiveness reigned and was apparent in politics, economics, religious practice, and education.

Sass (2008:18) states that in the 20th century various legislative acts sought to promote equal access and inclusion to the United States' character of economic opportunity, freedom and educational opportunities. The *Individuals with Disabilities Education Act* (IDEA) of 1990 (Sass, 2008:18) promoted the inclusion of learners with disabilities and established special programmes to accommodate learners of all physical and mental abilities. The *Individuals with Disabilities Education Act* (IDEA) entitles every learner to a free and appropriate public education in the least restrictive environment. The least restrictive environment mandate requires that all learners in special education be educated with typical peers to the greatest extent possible, while free and appropriate public education is still provided.

To ensure a free and appropriate public education, a team of professionals from the local educational agency meet with the learner's parents to identify the learner's unique educational needs, to develop annual goals for the learner, and to determine

the placement, programme modification, testing accommodations, counselling, and other special services that the learner needs. Parents become part of the multidisciplinary team, along with the local educational agency professionals, and they collaborate with team members to make decisions on educational placement.
According to Landin (2010:5) inclusion of learners with severe learning disabilities under the IDEA sparked debate about the academic achievement of disabled learners in regular classrooms and the viability of inclusionary legislation. In an effort to guarantee academic achievement within an atmosphere of inclusiveness, the US government enacted the *No Child Left Behind Act of 2001* (NCLB). Ever since learners are no longer restricted to traditional modes of learning which reflects more inclusive curricula (Lawrence-Brown, 2004:41). Most learners with mild disabilities spend the majority of their day in the general education setting with their typical peers.

Some learners, particularly those with learning disabilities, may spend time in a resource room for direct instruction. If a learner is not able to learn in a fully inclusive situation the special education team may decide to place the learner in a more restrictive setting, usually partial inclusion. Partial inclusion takes place when the learner with disabilities participates in the general education setting for part of the day and receives the bulk of academic instruction in a pull-out classroom, such as the resource room, with the special education teacher or other staff. The *No Child Left Behind Act* of 2001(NCLB) requires all government-run schools receiving federal funding to administer a state-wide standardised test annually to all learners under the same conditions (Theobald, 2009:51). All schools must show adequate yearly progress in test scores, e.g. each year its fifth graders must do better on standardised tests than the previous year's fifth graders. These yearly standardised tests provide for the main means of determining whether schools are living up to the standards they are required to meet. If the required improvements are not made, the school faces decreased funding and other punitive measures that contribute to the increased accountability.

Theobald (2009: 65) indicates that the 2004 *IDEA* re-authorisation changed learning disability identification procedures which, inter alia, required high qualification standards for special education teachers, stipulated that all learners with disabilities participate in annual state or district testing or documented alternate assessments, and, in response to activities related to weapons, drugs or violence, allows for a learner to be placed in interim alternative educational settings. The *IDEA* of 2004 addresses regulations regarding transition services for children with disabilities. *Transition services* are designed to focus on improving academic and functional achievement of the child, they are based on the individual's needs and provides instruction and experiences vital for employment and independent living.

Despite its societal problems the United States strives to offer equity and accessibility of education for all learners. In education, inclusiveness extends to include all learners regardless of socioeconomic status, ethnic background, and mental and physical abilities.

2.4 INCLUSIVE EDUCATION IN SOUTH AFRICA

2.4.1 Inclusion in the South African context

In the South African situation the understanding of inclusive education, and the social and political structures through which it is delivered, is informed largely by the country's historical background. As a result of this, inclusive education must therefore be seen against the background of the historical antecedents that have shaped the development of post-apartheid education policy.

Already in 1992 Archer, Green and Pooler (1992:99) stated that the context of education in South Africa is particularly complex because separate education departments existed for each of the four designated population groups, namely Black, Coloured, Indian and White. This system was characterised by vast disparities in *per capita* funding in different education departments, fragmentation, and

duplication of functions, responsibilities and services. In the same vein, Engelbrecht, Howell and Bassett (2002:59) add that special needs education was fragmented not only by the apartheid laws that enforced separation along racial lines, but also by legislation and policy that separated "ordinary" children from children categorized as having "special needs". Separate education departments, governed by specific legislation and fragmented along racial lines, reinforced the divisions in the education system (Engelbrecht *et al.,* 2002). The inequalities apparent in mainstream education were also reflected in special education.

In line with South Africa's constitution, education policy makers in South Africa were made aware that in reconstituting education, the rights of learners described as having special educational needs would have to be given due consideration. In line with international thinking, South African inclusive education activists argue for an education system that accommodates the learning needs of diverse learners, including those with disabilities, in mainstream classrooms. In order to illustrate the conceptualisation of inclusive education and the challenges in implementing inclusive education strategies within the South African context, it is necessary to consider the complex contextual influences that have shaped, and continue to shape, the transformation of education, including the move from conceptualising special needs within an individualistic deficits approach to needs, to a human rights approach within the social context in which life is lived out. According to Sayed (2000:102) these influences include a specific history of inequality, imbalance and injustice for the majority of the population that have shaped post-apartheid educational policy, as well as the 'fiscal constraints that the new government inherited in 1994.' (*ibid*.:102)

2.4.1.1The medical model of special needs

The philosophy of inclusive education cannot easily be reconciled with the way in which education support services have functioned for the greater part of the twentieth century. Similar to most other countries, education support services in

South Africa used a medical approach with the final occurrence being placement of learners in special schools, whereas the placement of learners is actually a minor issue in the underlying philosophy of inclusive education.

The theoretical framework, within which separate educational facilities for children with special needs and other learning barriers were designed, focused on the medical model of disability (Naicker, 2005:230). This approach locates the source of the deficits within the individual, justifies social inequalities because of biological inequalities, and also directly influenced the official sanctioning of the institution of special education in South Africa which was enacted through the 1948 *Special Schools Act*. The enactment of this view of diversity within the South African education system had the effects of legitimising exclusionary practices, affirming the status and power of professionals and creating the belief amongst teachers that teaching children with disabilities is beyond their area of expertise (Loebenstein, 2005:44).

The medical model utilises the patient-diagnosis-treatment sequence and paradigm, whilst using as its point of departure the philosophy that a learner is equal to a patient who is in need of a correct diagnosis and the concomitant treatment to function optimally again (Hay, Smit, & Paulsen, 2001:215). The departure from this perspective can probably be ascribed to the following factors: the realization that human beings cannot be classified into simple medical disability diagnoses; the realisation that learners may have different medical disabilities, but similar education needs; as well as the insight that diagnoses are often a way of social control (which is not necessarily as effective as it signifies). These factors can be summarised as being part of the human rights discourse (Naicker, 2005:231). Further explanations for the demise of the medical model may be the rise of post-modernism which seriously questioned the old modernistic habit of classification. Post modernists believe that the idea of a fixed identity of a person/learner is not correct, but that we are rather made up of multiple-selves, depending on the situation within (Hay,

2003:122). Disability categories are thus too fixed since disability may change and improve.

Inclusive education is currently understood as the basis of a paradigm that bypasses medical approaches and the concept of academic deficiency, and which promotes inclusive environments that embrace diversity. It requires adopting proposals that address the barriers facing those who seek admission to learning and participation rather than viewing those barriers as disadvantages (Booth & Ainscow, 2002: 79).

2.4.1.2 Bronfenbrenner's ecological systems theory

In the process of moving away from the medical model to a more inclusive approach to inclusive and special needs education, the focus was put on ecological and systems theories to provide a broader understanding of the learner with special needs. In opposition to the medical model the ecological systems approach came to the fore. One of the well-known scholars in the field of developmental psychology, Urie Bronfenbrenner, developed the *ecological systems theory* (Santrock, 2007). This theory defines four types of environmental systems which contain roles, norms and rules that powerfully shape psychological development. He calls these the *microsystem* (such as the family or classroom), the *mesosystem* (which is two microsystems in interaction), the *exosystem* (external environment which indirectly influences development, e.g., parental workplace) and the *macrosystem* (the larger socio-cultural context). He later added a fifth system called the c*hronosystem* (the evolution of the external systems over time). Santrock (2007:12) outlines the systems contained in the Bronfenbrenner's ecological theory as follows:

- ***Microsystem:*** The family, peer group and classrooms or neighbourhoods are called the microsystem which is the primary unit around a child influencing its development directly. Berk (2000:23) reports that this layer is the closest to the child and contains the structures with which the child has direct contact

and it furthermore encompasses the relationships and interactions a child has with his/her immediate environments.

- ***Mesosystem*** refers to relations between microsystems or connections between contexts. Examples are the relation of family experiences to school experiences, school experiences to church experiences, and family experiences to peer experiences. For example, children whose parents have rejected them may have difficulty developing positive relations with teachers.
- ***Exosystem***: This system involves links between a social setting in which the individual does not have an active role and the individual's immediate context. For example, a husband's or child's experience at home may be influenced by a mother's experiences at work.
- ***Macrosystem***: This system describes the culture in which individuals live. Cultural contexts include developing and industrialised countries, socio-economic status, poverty, and ethnicity. A child, his or her parent, his or her school, and his or her parent's workplace are all part of a large cultural context. Members of a cultural group share a common identity, heritage and values. The macrosystem evolves over time because each successive generation may change the macrosystem, leading to their development in a unique macrosystem.
- ***Chronosystem***: The patterning of environmental events and transitions over the life course as well as socio-historical circumstances (divorce, for example, is one type of transition).

The ecological model of Bronfenbrenner's theory attempts to explain the differences in an individual's knowledge, development and competencies through the support, guidance and structure of the society in which they live. This theory looks at a child's development within the context of the system of relationships that form his or her environment. Bronfenbrenner helps us to understand that we all exist within a context that influences both who we are and how we respond to life situations. Bronfenbrenner believes that the interaction between a number of overlapping ecosystems affects a person significantly.

According to Phelan (2004:253) the usefulness of this theory, like other systemic viewpoints, is that we often try to understand people in isolation from the factors that create both reinforcement for behaviour and patterns of interaction. This view clouds our judgment about what is happening with another person quite significantly. Warren (2005:863) adds that this model allows for treatment of various emotional and behavioural problems because the model places treatment externally and recognises that changing environmental factors can provide healing and strength. Educators can use this model to assess problems in a child's life and to aid in the rebalancing of a child's environment to begin healing.

The merging of ecological and systems theory into eco-systemic theory brought about a total new meta-theory for special needs education and education support services which is especially relevant to a developing country such as South Africa (Donald, Lazarus & Lolwana, 2002:56, 57). The eco-systemic perspective moved away from focusing on the individual's intrinsic problem(s) to a broader assessment of all systems impacting on barriers to learners and development. This inclusive approach will thus have to address all systems surrounding a learner which can possibly impact on special needs. These include the family, the school and even aspects of community functioning. Engelbrecht and Green (2007:22) refer to this as a holistic framework from which support service professionals should operate; an aspect which amounts to more than the sum of the individual parts.

2.4.2 Post-apartheid educational transformation and policy development

The central feature which distinguishes South Africa from other countries in terms of educational provision, is the extent to which racially entrenched attitudes and the institutionalisation of discriminatory practices led to extreme disparities in society as a whole. From 1948 until 1994 the only contender in the production of education policy was the state which utilised its power vested in legal complicity unhindered by a popular constitution (Department of Education, 1997a). The 1980's witnessed an

increasing demand for a democratic government and it became increasingly clear that any system imposed by an Apartheid-government would fail and that a radical transformation was necessary (Du Toit, 1996:5). The potential for meaningful participation which the democratic election of 1994 made apparent to the majority of South Africans, summoned a new era of possibilities for inclusiveness by virtue of the process of social and educational transformation (Loebenstein, 2005:69). The need for parity in all aspects of education was thus, according to Sayed (2000:13), a necessary imperative in a new democratic education system. The demand for parity was captured in the commitment to equity and redress as cornerstone principles of all education policies and the commitment of the new Government to bring South Africa in line with international standards of the recognition of human rights.

The overriding mandate and obligation of people given the responsibility of shaping the education policy after 1994, were to transform education by addressing the disparities and inequities of the past and to create one system that could provide all learners with access to quality education (Waghid & Engelbrecht, 2002:20). The *South African Schools Act 84 of 1996* (RSA 1996) emphasised the right of all learners to appropriate education. In a parallel endeavour the international inclusive education movement increasingly desired to replace a charity or medical discourse about disability with a rights discourse (UNESCO 1994). In South Africa the rights of those with disabilities were highlighted in the *White Paper on an Integrated National Disability Strategy* (Department of Education 1997a).

The final adoption of the Constitution of South Africa in 1996 emphasised the new democratic government's commitment to restoring the human rights of all marginalised groups. The *Constitution of the Republic of South Africa Act* of 1996 includes a *Bill of Rights* that entrenches the rights of all South Africans, regardless of race, gender, sexual orientation, disability, religion, culture or language, to basic education and access to educational institutions (RSA, 1996a).

Key education policy documents and legislation such as the *White Paper on Education and Training* (Department of Education, 1995), the *White Paper on an Integrated National Disability Strategy* (Department of Education, 1997a) and the *South African Schools Act* (RSA, 1996) stress the principle of education as a basic human right as enshrined in the Constitution. This principle implies that all learners have the right to equal access to the widest possible educational opportunities and it encapsulates the vision of an educational system that not only recognizes the wide diversity of children's educational needs, but also expects schools to meet these diverse needs (Waghid & Engelbrecht, 2002:24). However, the first clear indication of a move towards acknowledging the complexity of educational needs and the role that social and political processes that operate within education systems play in excluding children, was in the *Report of the National Commission on Special Needs in Education and Training* (NCSNET) and the *National Committee on Education Support Services (*NCESS) in 1997 (DoE, 1997). The report stressed the need for a paradigm shift, from a focus on "learners with special needs" to a systemic approach in identifying and addressing barriers to learning. Some of the key barriers in South Africa that render a large number of children vulnerable to learning breakdown and sustained exclusion are, for example, problems in the provision and organisation of education, socio- economic barriers, high levels of violence, HIV/ AIDS and the negative attitudes of school communities towards diversity (DoE, 1997; Muthukrishna & Schoeman, 2000:316).

According to Engelbrecht and Green (2007:22) the *National Commission on Education Support Services (*NCESS) and *National Committee on Special Needs in Education and Training* (NCSNET) were tasked in 1996 to meet as one collaborative group in order to investigate the existing situation and recommend policy. The Commission's report (DoE 1997a) identified factors that were conceptualised as key barriers to learning and development. Barriers to learning include socio economic barriers, discriminatory negative attitude and stereotyping, an inflexible curriculum, inappropriate language of teaching and learning, inappropriate communication, inaccessible and unsafely built environments, inappropriate and inadequate

provision of support services, lack of enabling and protective legislation and policy, lack of parental recognition and involvement, disability and lack of human resources development strategies (Engelbrecht & Green, 2007:preface).

The Commission's recommendations informed the development of the policy on inclusive education as articulated in *Education White Paper 6: Special Needs Education: Building an Inclusive Education and Training system* (DoE 2001). This policy document outlines six strategies or levers for establishing an inclusive education and training system. These are:

- The implementation of a national advocacy and information programme in support of the inclusion model;
- The qualitative improvement of special schools for the learners that they serve and their conversion to resource centres that are integrated into district-based support teams;
- The designation and conversion of approximately 500 mainstream primary schools to full-service schools, beginning with 30 schools in identified districts;
- The establishment of district-based support teams to provide coordinated professional support services to special schools, full-service schools and other schools in the district;
- The general orientation and introduction of management, governing bodies and professional staff to the inclusive education model and the targeting of early identification of disabilities and intervention in the foundation phase;
- The mobilisation of all disabled children and youth of compulsory school-going age who are currently outside the school system.

2.4.3 Learning support structures as outlined by W*hite Paper 6* and subsequent policies

The *Education White Paper 6* (DoE, 2001*)* was published after several draft documents and negotiating sessions with relevant stakeholders and written

comments from all walks of life (see above). Most of the recommendations of the NCSET/ NCESS report were included in this policy document. A period of 20 years was allowed for the implementation of the policy of inclusive education. According to Landsberg, Kruger and Nel (2005:62) the *Education White Paper 6* (2001) makes provision for support by means of a systems approach and collaboration between these systems (refer to 2.4.1.2). Support at the different levels (national, provincial, district and school level) is discussed below.

2.4.3.1 National level

The Department of Education at national, provincial and district levels has an obligation to monitor all special schools on regular basis and to provide the necessary support. The function of the National Department of Education is to formulate policy in collaboration with all the stakeholders who are involved in education. The section in the South African Constitution on human rights sets out the fundamental rights of each person in this country. No policy can therefore contradict rights.

The *South African Schools Act 9 Act no. 84 0f 1996* makes provision for compulsory education for all and universal admission to public schools. The member (of each province) of the Executive Council must, where reasonably feasible, provide education for learners who experience barriers to learning at ordinary public schools and also provide relevant educational support service for such learners.

2.4.3.2 Provincial level

The role of the Department of Education of the nine provinces is to implement policy accepted by the National Department of Education. It stands to reason that the provinces are not on the same level regarding the implementation of the policy of inclusion as resources and manpower differ from province to province. The provinces are responsible, *inter alia*, for resource development (human and

technical), building of schools, distribution of finances and resource material, employment of educators and admission of learners who experience barriers to learning (Landsberg, *et al.,* 2005:63). The Provincial Education Department must develop District-Based Support Teams (DBST) to support the implementation of *White Paper 6.*

According to the *Making all Schools Inclusive* (DoE, 2010) document the roles to be played by provinces in advancing inclusive education are:

- The province ensures that budgets make provision for inclusive education.
- The province prioritises support services to all learners in their neighbourhood school.
- The province strengthens its special schools to function as resource centres.
- The province manages admissions so that no learners are unnecessarily referred for placement in special schools.
- The province ensures that learner transport systems are inclusive.
- The province ensures that over time all schools are resourced so that they become accessible and have the necessary individual devices and equipment to support learners with disability.

2.4.3.3 District level

Each province is divided into several districts, each of which has a team which manages inclusive education in that district and which is called the district-based support team. In the *White Paper 6* (DoE 2001) the Department of Education commits itself to strengthening education support services through the establishment of district-based support teams which should provide a coordinated professional support service that draws on expertise in further and higher education and local communities and which should target special schools and specialised settings, designated full-service as well as other primary schools and educational institutions.

The Conceptual and Operational Guidelines for the Implementation of Inclusive Education: District Based Support Teams (DoE, 2005) outlines the core support providers at district level as specialist learner and educator support personnel currently employment in the Department of Education at district, regional, or provincial level. These include psychologists, therapists, remedial/learning support teachers, special needs specialists (e.g. relating to specific disabilities) and other health and welfare professionals employed by the Department of Education. A District Support Team should be a flexible team that may differ according to the needs of the school and the learners. The core purpose of these teams is to foster the development of effective teaching and learning primarily by identifying and addressing barriers to learning at all levels of the system as well as the development and ongoing support of local institutional-level support teams in schools, colleges, early childhood and adult learning centres.

According to the *Draft guidelines for the implementation of inclusive education* (DoE 2002a:102-105) the core functions of the district-based support team are:

- The development and continued back-up of support teams in the schools and early childhood learning centres in supporting "…the capacity building of these institutions, identifying and prioritising learning needs and barriers to learning in their district, identifying the support needed to address these challenges and pursuing these within a strategic planning and management framework and ongoing monitoring and evaluation of support." They should also link these institutions with formal and informal support systems so that the needs and barriers can be addressed.
- The main focus would be to provide indirect support to learners through a supporting teaching and learning environment responsive to the full range of learning needs. A second focus would be to provide direct learning support to the learners where the school-based support team is unable to respond to particular learning needs (DoE, 2002a:103).

2.4.3.4 School-based support teams/ Institution-level support teams

Landsberg *et al.* (2005:66) argue that whether the school is a special school as a resource centre, a full-service school or an ordinary school, it should establish a school-based support team (SBST) which is responsible for the provision of learning support. Teachers are expected to be dynamic, competent and innovative in their teaching methods to accommodate the different learning styles of the learners (Landsberg *et al.*, 2005:66).

An institutional-level support team is an 'internal' support team within institutions such as early childhood centres, schools, colleges, adult learning centres and higher education institutions. In each institution this team will ultimately be responsible for liaising with the district-based support team and other relevant support providers about identifying and meeting their own institution's needs. For this reason, institutional-level support teams should be constituted of educators and staff from each individual institution (DoE, 2005).

White Paper 6 (DoE 2001) states that the primary function of these teams is to put in place properly coordinated learner and educator support services through support to the teaching and learning process by identifying and addressing learner, educator and institutional needs.

Another core purpose of these teams, according to *The Conceptual and Operational Guidelines for the Implementation of Inclusive Education: District Based Support Teams* (DoE, 2005) is to support the teaching and learning process by coordinating all learners, educators, curriculum and institution development support in the institution. This includes linking the support team to other school-based management structures and processes or integrating them for better coordination of activities.

A final function of Institution-level support teams is to collectively identify institutional needs and particularly barriers to learning at learner, educator, curriculum and institutional levels. It is expected of these teams to collectively develop strategies to address identified needs and barriers to learning. This should include explicit focus on educator development, parent consultation and support.

2.4.4 Follow-up reports and guidelines on *White Paper 6.*

As a follow-up on *Education White Paper 6*, several reports and guidelines on inclusive education in South Africa have been published over recent years. These include the following:

2.4.4.1 The report on Implementing Inclusive Education in SA (2008)

In 2004, the Department of Education issued a tender for field-testing the implementation of *Education White paper 6*. The Council for Scientific and Industrial Research (CSIR) was appointed to undertake the overall project management of the field test, the Sisonke Consortium for Human Resource Development Programme. The field test found, amongst others, that special schools need to focus on specific disabilities and not a wide range thereof so that the support they offer is specialised, and furthermore that the fear as well as negative attitudes towards disability amongst the broad public still need to be addressed. The test highlights the main challenges as being the glaring disparities in the resourcing of special schools across provinces, the lack of support by district officials as well as the delay in converting both mainstream schools to full-service schools, and selected special schools into resource centres.

Based on the findings and challenges identified in the report, it is recommended that transversal teams be established in a manner that ensures representation of all critical directorates/units at all levels in the system for effective and successful

further rollout of inclusive education, and also that teachers are trained in the key implementation strategies of inclusive education. Another recommendation is to improve capacity levels in the District-based Support Team to ensure, first, the establishment of Institution-level support teams in all schools in their jurisdiction and second, the on-going training, mentoring and monitoring of teachers and schools - especially in the area of curriculum differentiation.

2.4.4.2 The National Strategy on Screening, Identification, Assessment and Support (SIAS: 2008)

The aim of introducing the *Screening, Identification, Assessment and Support (SIAS) strategy* (DoE, 2008) in the education system is to overhaul the process of identifying, assessing and providing programmes for all learners requiring additional support so as to enhance participation and inclusion (DoE, 2008).

The intention with the crafting of the SIAS strategy is to address and rectify the following shortfalls within the education system concerning identification, assessment and support of learners:

- Access to special services or facilities is limited as special schools and education support services are not always within reach of communities. This leads to marginalization and exclusion of children with additional support needs, including a large number with disabilities;
- The absence of a system of rigorous assessment and identification to ensure a consistent process of screening, identification, and referral of learners to special schools;
- The general lack of involvement of teachers, parents and learners in the assessment process;
- Assessment practices that fail to outline the nature and level of support needed, thus making it difficult to fund that support appropriately (DoE, 2008).

The SIAS strategy (DoE, 2008) states that in situations where children with disabilities may not achieve certain standards in specific learning areas (presently subjects) on account of their disabilities, a policy for the straddling of grades needs to be developed in order to prevent such learners from being excluded because research has shown that grade retention does not remedy such situations. In addition, norms and standards for the provision of resources and assistive devices for learners with disabilities have to be developed in order for funding to be channelled towards provision of support for such learners in mainstream schools (DoE, 2008).

2.4.4.3 Guidelines for Full-Service/Inclusive Schools (2010)

This is a set of guidelines on how to ensure that ordinary schools have an inclusive orientation and it moreover sets criteria for schools, districts and provinces against which to measure their progress towards inclusion. These guidelines incorporate incentives for schools to become inclusive as a kind of rewarding of excellence. It provides criteria and minimum standards that a school/institution must comply with in order to be considered an inclusive/full-service school/institution. It further explains the main principles of full-service schools/ institutions, describes their characteristics and outlines the institutional development process.

2.4.4.4 Guidelines for Inclusive teaching and learning (2010)

These guidelines provide additional information to educators on conditions, illnesses, disabilities as well as the deprivations that affect children's ability to learn effectively. These additionally outline characteristics, the barriers they present and strategies for effective teaching. Through these guidelines an attempt is made to get rid of the common misconception that barriers to learning exist only in the learner and that barriers to learning are best addressed during practical sessions of a lesson by giving special needs children less demanding tasks, thereby lowering expectations.

2.4.4.5 Responding to Diversity through the National Curriculum and Assessment Policy Statement (2011)

In all classrooms learners have diverse learning needs and if teachers are not responsive to these needs and provide the necessary support, learners may experience barriers to learning. *Responding to Diversity through the National Curriculum and Assessment Policy Statement* (DoE, 2011a) is a set of guidelines that is intended to provide teachers, principals, subject advisors, administrators and other personnel with parameters and strategies on how to respond to learner diversity in the classroom through the curriculum. Curriculum differentiation is seen as a key strategy for responding to the needs of learners with diverse learning styles and needs (see 2.4.6.2).

Some of these reports will be discussed in more detail further on in the chapter.

2.4.5 Full-service schools

The South African ideal is that the majority of schools in the country should function as full-service schools. With the introduction of the policy on Inclusive Education, as published in the *Education White Paper 6* in 2001, the Department of Education made a commitment to ensure that all children would be welcomed in all schools and that they would be supported to develop their full potential, irrespective of their background, culture, abilities or disabilities, their gender or race. The concept 'full-service/inclusive schools' was introduced to show how ordinary schools can transform themselves to become fully inclusive centres of care and support (DoE, (2010a:1).

According to Warnock and Norwich (2010:34) inclusive schooling is essential to the development of an inclusive society. It involves having an education service that ensures that provision and funding is there to enable learners to be educated so that

they can be fully included in the life of their school community and also enjoy a sense of belonging and achievement.

The *Guidelines for Full-service/Inclusive Schools 2010* (DoE, 2010a) state that full-service / inclusive schools:

- have the capacity to respond to diversity by providing appropriate education for individual needs of learners, irrespective of disability or differences in learning style or pace, or social difficulties experienced.
- aim at inclusion in the way it is organised with regard to structure, policies, practices, pedagogy and culture.
- should be amenable to sharing resources with other schools while serving as a model site for inclusion and they must, therefore, have a level of human resource capacity that can be built on.

The principal and his/her SMT should have an unwavering belief in the value of inclusive schooling and considerable knowledge and skills for translating the concept into practice. With regard to support, education departments at district, provincial and national level should collaborate with other key line function departments and NGO's to ensure that inclusive education in the schools is supported through inter-sectoral collaboration

2.4.6 The inclusive school

When confronting the challenge of building an inclusive school, current conditions must be taken into account. As a result of South Africa's particular history of inequalities and discrimination and the context of rapid social changes, most schools do not even have basic resources (e.g. toilets, water, electricity, sufficient classrooms) and they are experiencing a serious breakdown in the culture of teaching and learning. Any effort at building an inclusive school will have to include the identification of specific priorities relating to particular needs in the context of building a culture of teaching and learning (Engelbrecht, 1999:58).

UNESCO (2008:18) identifies the following elements that should constitute a framework for the development of an inclusive school:

- Schools must be understood in the context of local, national and global dynamics, for example, social dynamics such as racism, sexism and other forms of discrimination experienced in a society will be reflected and could be further perpetuated or resisted through a school.
- The culture of a school comprises the values, norms and overall climate of the school. This is the central element of school life which constructs all other aspects and the school culture is itself developed through the aspects of school life.
- Every organisation or school has its own particular identity. The latter refers to a school's own expression of "who we are and where we are going". This element includes a framework with the school's particular mission and broad aims and tasks. A school's policy usually reflects these aspects.
- The element of strategy identified in the framework includes stated areas of achievement or goals, as well as criteria for measuring these achievements (often referred to as outcomes). The setting of goals is followed by planning action (through processes such as strategic planning) followed by various forms of evaluation to check whether the outcomes have been achieved. The process of curriculum development and quality assurance is central to this process in a school setting.
- The next element is that of structures and procedures. Structures consist of lines of responsibility and authority, and of units and departments including how they relate to communication and accountability. Procedures refer to the rules and regulations and methods that dictate how these structures relate to one another.
- Technical support is a further element identified in this framework. It includes administration, financial and other resources allocation and control in a

school. It refers primarily to the various forms of administrative and material resources available to support the school in its attempt to reach its goals.

- Human resources utilisation and development within a school is a crucial aspect of life of a school.
- Leadership and management ensure that all the other aspects are held together and developed.
- Developing a supportive environment would include both the physical and psychological environment of the school, for example its buildings and grounds would be safe and include facilities for learners with particular disabilities (e.g. wheelchair access).

Engelbrecht *et al.* (2002:63) suggest the following framework (Figure 2.1) which may assist schools in their attempts to build an inclusive school.

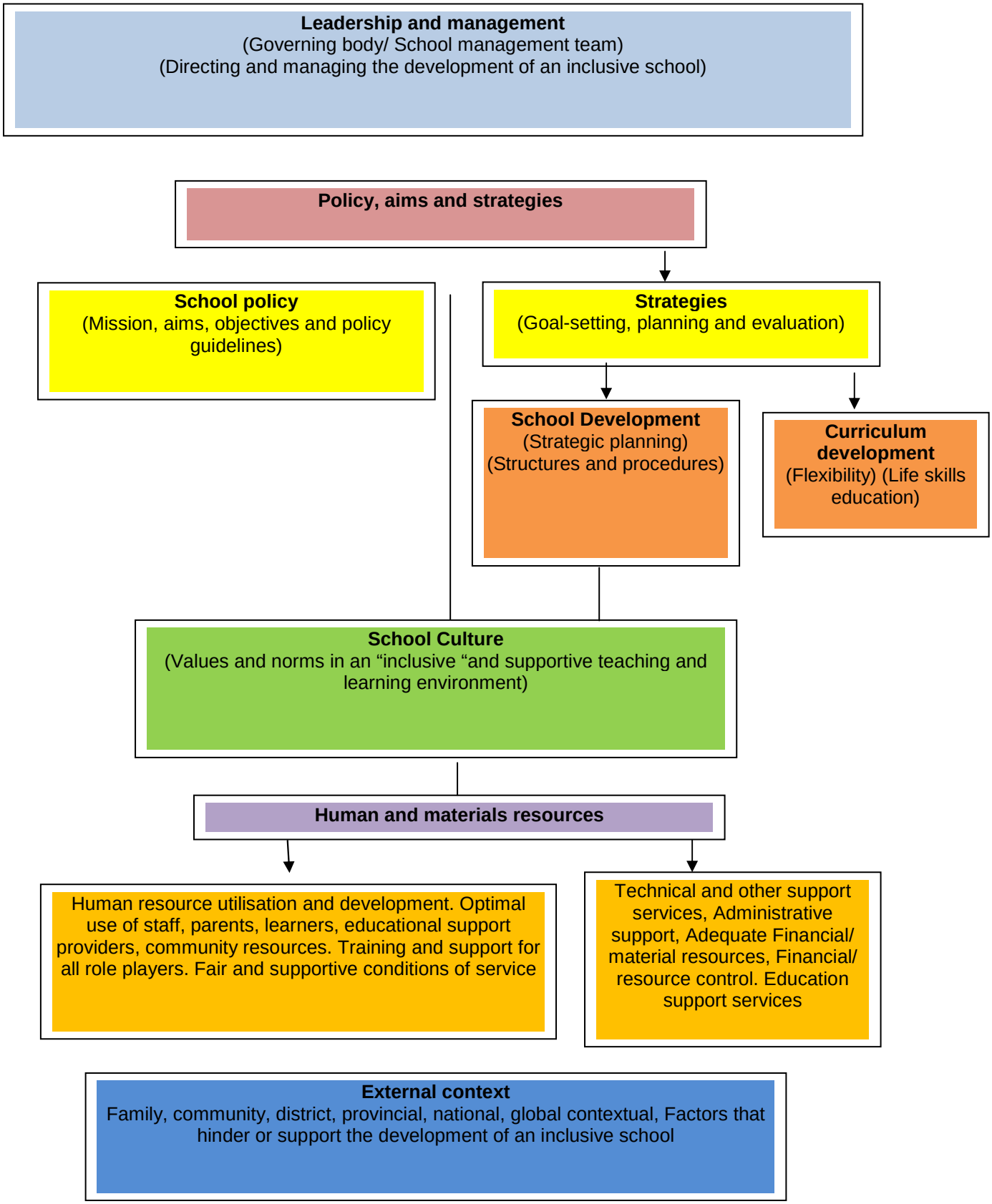

Figure 2.1 Framework for building an inclusive school

Corresponding with the above, Gadagbui (2006:34) points out that in inclusive education, the child's right is realised and actualised as the school is changed, and not the child. She identifies the following important aspects which have to be kept in mind when building an inclusive school:

- There must be school improvement for all: physical environment accessibility or conduciveness to teaching and learning.
- The child must be at the centre of the curriculum: child needs and interests must be pursued in a least restrictive environment, with equal opportunities.
- There must be flexible teaching methods: individual attention, vocabularies to be age appropriate, methods suitable to a child's intellectual observation.
- Reduction in the drop-outs and class repetition: working at the level of the child's learning and interest as well as retention.
- Well supported teachers: teacher motivation, tailor made teaching and learner media and teachers' own creativity/motivation, workshops, in-service training, team teaching/cooperative learning.
- Parent and community involvement.
- Appropriate teaching aids and equipment (where needed): hearing aids, augmentative communication boards, stylus and frame, Braille machine and papers, magnifying glasses.
- Alternative methods of teaching education: projects methods, lecture methods, distance education, e-learning, and open learning.
- Positive teacher attitudes.

Gadagbui's view is further supported, outlined and explained through the following sketch from the UNESCO flyer (Gadagbui, 2006):

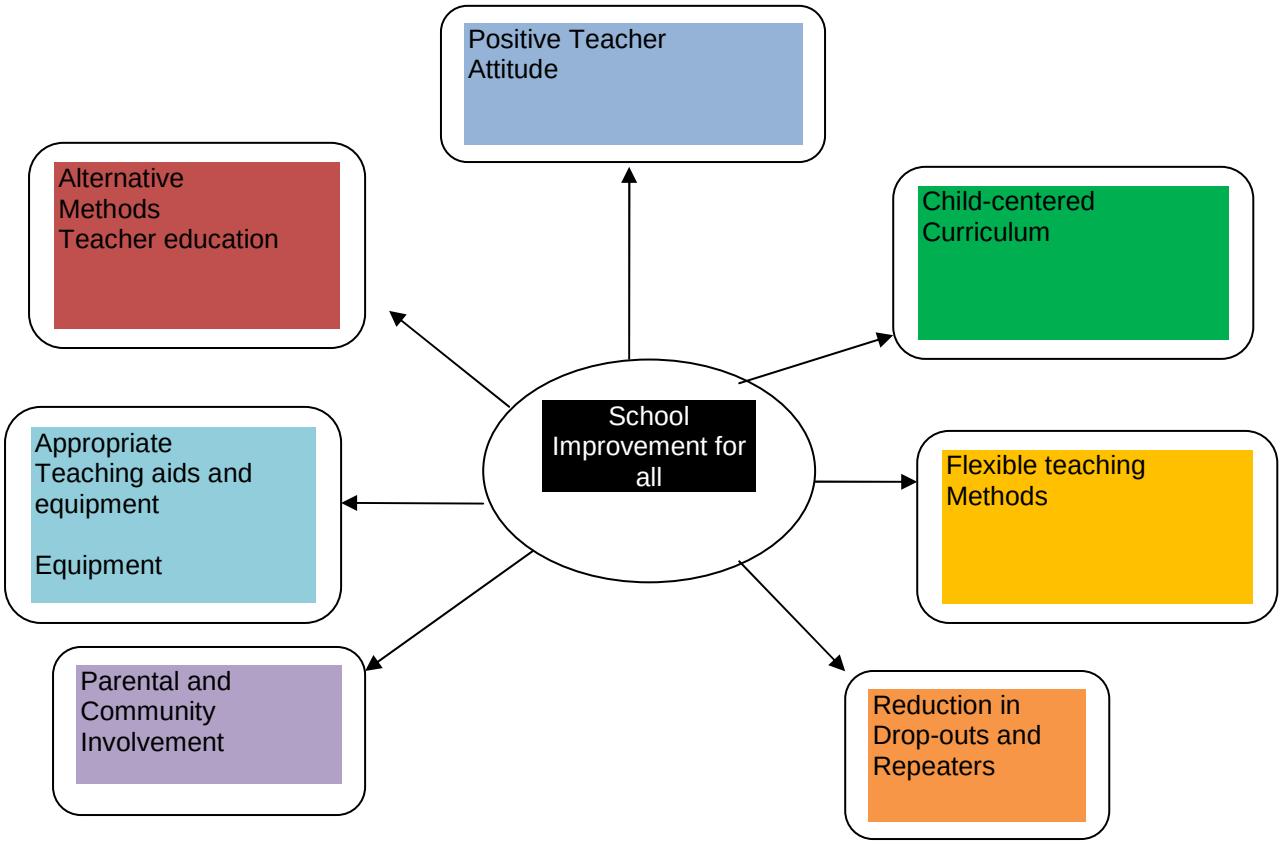

Figure 2.2 Building an inclusive school: (Gadagbui, 2006)

2.4.6.1 Inclusive classrooms

As more learners with disabilities together with those who have experienced some form of learning breakdown are accommodated in ordinary classrooms, teaching is likely to become more demanding for a number of reasons, as discussed below.

2.4.6.1.1 An inclusive classrooms environment

In the inclusive classroom some *learners* have special educational needs for a variety of reasons, either intrinsic or extrinsic, which have to be accommodated. No two learners are disabled in exactly the same way, therefore teachers in

collaboration with support personnel have to develop a diagnosis and subsequently plan instructional programmes designed to achieve specific objectives appropriate to a particular learner.

All barriers in the *physical environment* should be removed to make the classroom accessible to learners with physical disabilities, e.g. space is needed for wheelchair access. Lewis (in Engelbrecht *et al.,* 1999) points out that the successful use of assistive technology to compensate for disabilities depends on equity of access and ease of technology use. The *practical organisation* of learning materials is important in any classroom, but particularly so in the inclusive classroom. Learning centres (schools, special areas in schools or special classrooms) that are designed to provide assistance to learners who require high levels of support, may be set up and organised for the integrated curriculum revolving around developmental outcomes and learning objectives. Learning centres will provide more individualised instructions. As far as the *curriculum* is concerned, mixed-ability teaching requires a diverse range of strategies. If all learners are regarded as having particular personal learning needs, teaching requires the identifications of learner strengths alongside with assistance in overcoming particular weaknesses. In this information age teachers are expected to be facilitators who should encourage learners to construct their own knowledge and become independent learners.

In the inclusive classroom the concept of curriculum differentiation is of considerable importance.

2.4.6.2 Curriculum differentiation

Curriculum differentiation refers to the mediation of the National Curriculum at an instructional, content and material level to accommodate learner diversity (DoE, 2011a). Barriers to learning arise from the different aspects of the curriculum such as the content, the language, classroom organisation, teaching methodologies, pace of teaching and time available to complete the curriculum, teaching and learning

support materials and assessment. According to Mitchell (2008:102) curriculum differentiation is a key strategy for responding to the needs of learners with diverse leaning styles and needs. It involves processes of modifying, changing, adapting, extending, and varying teaching methodologies, teaching strategies, assessment strategies and the content of the curriculum. It also takes into account learners' ability levels, interests and backgrounds.

Byers and Rose (2004:79) outline the following advantages of effective differentiation:

- It assists individual learners to compensate for intrinsic and/or extrinsic barriers to learning.
- It allows the learners to use current skills while promoting the development of new ones.
- It prevents dissonance between the current skills used by the learner and learning activities designed for the class.
- It reduces the level of abstract information to make content relevant to the learner's current context and future life.
- It creates harmony between the learners' learning style and educator's teaching style.
- It forms the basis for customising learning programmes.

2.4.6.2.1 Differentiating content

An important aspect to be differentiated in the curriculum is the content (Mitchell, 2008:104). This can be done by adapting the content of the curriculum in such a way that it is manageable to a wider range of learners. This should not be seen as a watering down of the curriculum, but rather as a graded process where learners are taken by a different route to a similar endpoint.

2.4.6.2.2 Differentiating teaching methods

Teachers are aware that children come to their classes with different abilities, skills and knowledge, socio-economic backgrounds and personalities. In order to respond to learners' diverse needs they need to differentiate teaching methods and strategies. The key to differentiated teaching methods entails the flexible use of a wide range of learning materials, methods of presentation, learning activities and lesson organisations (Byers & Rose, 2004:84). According to the DoE (2011a) learning should be facilitated through the planning of diverse teaching /learning activities that cater for the diverse learning support needs of all the learners in the classroom. Learning and teaching should also be structured to create access to activities that will create opportunities.

2.4.6.2.3 Lesson organisation

The best way to meet learners' different learning needs is to organise lessons in a number of different ways. It means that teachers need to differentiate the manner in which activities are planned and organised in a lesson (Shaddock, Giorcelli & Smith, 2007:22). It moreover ensures the maximum involvement and participation of all learners in the lesson. Adaptations are made to the types of activities presented to the learners which should be based on their readiness, developmental levels, interests, background and learning profiles (DoE, 2011a).

2.4.6.2.4 Lesson plans

According to the *Guidelines for Inclusive Teaching and Learning 2010*, DoE (2010b:19) lesson plans have to provide differentiated learning, teaching and assessment activities to ensure effective multilevel teaching. However, in addition to these forms of differentiation, teaching and assessment activities will be adapted at lesson plan level for learners who need specific additional support as a result of

individual barriers to learning. Differentiation at lesson plan level will also be required for all learners in a class who need specific additional support because of individualised barriers to learning. Those involved in this process must include the teachers, parents, school and district based support team (where they exist). Other relevant professionals from the community can also be consulted.

2.4.6.2.4 Implications of differentiation

Byers and Rose (2004:79) outline the following implications of differentiation in the inclusive classroom:

- Teachers offer adaptations to what learners learn (content), how they learn (process) and how they demonstrate what they have learned (product).
- The differentiation in the design of learning programmes in special schools, special schools as resource centres, and full-service schools should suit the needs, strengths and interests of learners experiencing barriers to learning and should influence the number, weighting and duration of learning programmes as well as the decision-making criteria on progression and certification.
- Learners with a diverse array of needs will be accommodated in the number of activities planned, the strategies for facilitating teaching and learning, the resources needed and the time needed for both learners who are straddling grades and learners who have to take on additional material to meet their academic potential.
- The previous point implies the adjustment of tasks to suit the various interests, needs, aptitudes, experiences and previous achievements of diverse groups of learners (*ibid.*:79).

2.4.6.3 Assessment in an inclusive setting

The *National Protocol for Assessment* (DoE, 2011c) defines assessment as a process of collecting, analysing and interpreting information to assist teachers, parents and other stakeholders in making decisions about the progress of learners.

Since the National Curriculum Statement (NCS) is learner centred, it implies that every learner's strengths and needs will be known and accommodated in an inclusive classroom so that, in due time, each learner will achieve the designated objectives at individual levels. It is expected of educators to employ educational assessment to gather important, relevant information to serve as 'markers' or milestones in decision-making about the facilitation of learning in their classrooms. This process amounts to an appraisal of the education and training which takes place in the inclusive classroom because such indicative data informs the further stages of learning and teaching to the benefit of all the learners.

Bouwer (2005:57-58) identifies two strategies in assessment as a means of identifying learners' needs: norm referenced assessment and criterion-referenced assessment. In **criterion-referenced tests** particular outcomes are targeted in a level-appropriate way and the learner's competence is examined in more detail. These tests are more closely linked to a particular curriculum or set of competencies. A learner's score is not compared to a group, but it is instead compared to a predetermined criterion. These tests need not be traditional by assessing learner's mastery of a specific goal, but they tend to give more direction in terms of the learning support desired, the grouping for instruction and the assessment of individual progress.

On the other hand**, norm-referenced tests** compare an individual learner's performance to that of a group of the same age or grade level. These tests do not necessarily represent all the essential criteria contributing to a particular level of skill

or knowledge, as is the case with criterion-referenced tests. The results may therefore actually prove unhelpful - it may only confirm the learner's progress or lack thereof in comparison with others of the same age or grade, and it normally provides no direction as to which learning support strategies should be implemented.

2.4.6.3.1 Purpose of assessment

To be broadly inclusive, assessment has to be continuous and teachers need to develop a conscious habit of reflecting on and interpreting everything that facilitates or obstructs learning for each of the learners in the classroom (Lubbe, 2004:317). "Reflecting" refers to a process of thoughtful consideration of the learners, of what has gone before, what has happened in the course of the lessons and how teacher-constructed activities and interactions have affected outcomes. It also includes meditation on the ways in which the atmosphere in the class or the school climate has impacted on the learners. These reflective questions usually result in the emergence of new insights and ideas for adjusting and improving future learning experiences.

Lubbe (2004:320) explains that the core purpose of all assessment within education is to promote effective teaching and learning. Assessment in the inclusive classroom helps in assisting learners in the learning process by gathering data to assist in the crafting of a well-structured programme of learning experiences to achieve the desired learning outcomes. Within this context, however, assessment can be used for identifying barriers to learning, and for pointing to where and how these barriers could be addressed. This could include various interventions at any level of a particular aspect of the curriculum, e.g. development of the institutional environment or addressing particular family, community or social factors.

As Bouwer (2005:59) points out: assessment brings a diagnosis of strengths and/ or needs in order to stimulate self-evaluation, promote reflection and justify the formulation of an accelerated or remedial programme. In assisting the teacher in

providing appropriate experiences, assessment should provide information on learners' needs and serve as a tool for the continual improvement of teaching and learning

2.4.6.3.2 Differentiating assessment

Differentiating assessment involves rethinking the traditional practice of having all learners do the same assessment tasks at the same time. In this new way of thinking, teachers need an assessment approach and plan that is flexible enough to accommodate a range of learner needs. Within a differentiated curriculum, assessment of learners and their learning is integral to the teaching and learning process. Differentiated assessment is based on the thinking that the needs of learners cannot all be met in the same way.

The *Guidelines for Responding to Learner Diversity in the Classroom through Curriculum and Assessment Policy Statements* (DoE, 2011a:21) indicates the following key principles for assessment in a diverse classroom:

- Every learner should have access to the standard of assessment best suited to his needs.
- Assessment gives information about what the child can do at a particular stage.
- Assessment informs the teacher about what support a learner needs in order to progress to another level.
- Every child can illustrate what knowledge and skills he or she has learned in creative ways.
- Assessment should be authentic and make provision for multiple abilities, learning styles and levels.
- Assessment is supportive of teaching practices.

In the same vein, The *National Protocol for Recording and Reporting* (Grade R-12),(DoE, 2011b) allows for three key types of alternate assessment that can be used to assess learners experiencing barriers to learning, including learners with disabilities:

- **Alternate assessments based on alternation of knowledge (content, concepts and skills)** for learners with a significant cognitive disability. These assessments are based on the grade-level content covered by the general assessment, but at reduced depth, breath, and complexity.
- **Alternate assessment based on modified attainment of knowledge (content, concepts and skills)** for learners with disabilities who are working on grade-level content that is covered by general assessment. However, because of their disability they may require more time to master the content. It also includes learners with moderate intellectual disability, for example the deaf or learners on skills programmes, etc.
- **Alternate assessment based on modified attainment of knowledge (content, concepts and skills)** for learners with disabilities or learning difficulties that need testing formats or procedures that provide them with equal opportunities to demonstrate their attainment of content which is at the same grade-level as the general assessment.

The adapted approach to assessment, as discussed above, may be described as being rooted in the ecosystemic model (see 2.4.1.2) and as having clear constructivist features. The ecosystemic model of assessment examines the interactive relationships of the different systems (home, school, and wider social spheres) in which learners function, the way in which these impact on learning, and the way in which they might be utilised for the provision of balanced and enabling environments for all learners (Engelbrecht *et al.,* 1999:104). Learners are viewed as active participants in the process of gathering information on their behaviour, the processing routes they select, their progress over time, the indicating of any special

facilities or resources which they may require, their interactions with their studies as well as their socialization.

2.5 CHALLENGES TO INCLUSIVE EDUCATION IN SOUTH AFRICA

According to Engelbrecht & Green (2007:13) findings from research and evaluation studies have highlighted several challenges to inclusive education in South Africa. These include the need for conceptual and practical integration of the inclusive education agenda with the National Curriculum Statement, the need for teacher capacity development in general, the need for role-player capacity development for collaboration, the need to address current teacher morale and attitudes, the need to rethink training and development for inclusion and address the current physical and psychosocial environment in many schools.

It was assumed that the introduction of curriculum 2005 based on the *National Curriculum Statement (NCS) for Grade R-9* (Department of Education, 2002 b) would enable teachers to implement inclusive education more effectively. While this assumption was legitimate, one of the major challenges confronting teachers is making the conceptual link between inclusive education and the National Curriculum. Inclusive education tends to be viewed by teachers as an extra burden. The challenge is to present teachers with a coherent package that clarifies the relationship between policy, curriculum and inclusive education (DoE, 2002b).

2.5.1 Teacher development capacity

It is clear that teachers lack adequate knowledge, skills and training for effective implementation of inclusive education in South Africa. A comprehensive study conducted by Hay, Smit and Paulsen (2001:213) revealed that teachers in South Africa have a definite lack of knowledge about issues relating to inclusive education. Furthermore, the teachers felt unprepared and ill-equipped to teach in inclusive

classrooms as a result of their lack of training, lack of time, large classes and lack of teacher experience.

2.5.2 Role player capacity development for collaboration

The development of collaboration skills, although neglected, is an essential aspect of preparation for an inclusive education system. Support challenges at school level include poor strategic planning on the part of the school and the district as well as resistance to change and unavailability of district personnel. If school-based support teams are to succeed, they need to be able to access support from the district and from the community. Da Costa (2003:117) suggests, for example, that the gap between conceptualising inclusive education and an understanding of how to implement it in the day-to-day life of the schools is apparent, not only among teachers, but at all levels of the system. Experiences of structured and supported collaboration and training in collaboration skills are urgently required.

2.5.3 Teacher training and support

Inclusive education is a reality in South Africa and it involves a philosophical shift. Swart and Pettipher (2005:20) point out that a paradigm shift from an individual to a systems approach cannot happen by simply changing vocabulary in a particular training session. It requires considerable time because it is a developmental process that goes beyond workshops and other in–service training activities. Teachers need time to create insight and develop confidence and coping strategies and they need to do this in the context of continuous support in the classroom. Arbetter and Harley (2002) posit that the *Education White Paper 6* estimates a twenty-year period for the effective implementation of inclusive education and there is consequently an urgent need to find ways of integrating training and support during this transition period.

2.5.4 Physical and psychological environment

Inclusive education means ensuring that all children have access to good quality education in an environment where they are able to learn. The development of environments that are conducive to learning is an essential component of the overall efforts made by most countries to improve the quality of education and increase access to schools. Kamper (2008:2) reports that in many parts of South Africa the education system is still burdened by a legacy of disparities. A large number of schools still have overcrowded classes and they lack physical space for learner's discussions, equipment to enable learner investigations and materials to make learning interesting, relevant and challenging. These conditions prevent access to schools, create conditions that are not conducive to learning and affect implementation of the various Curriculum and Assessment Policy Statements.

A favourable psychological learning environment is increasingly recognised as a precondition for successful learning. Many teachers in South Africa have experienced only authoritarian and critical classrooms and have not yet acquired the skills to create a different, more accepting classroom atmosphere.

2.5.5The influence of attitudes

An attitude is usually defined as a tendency to react positively or negatively towards a certain object, be it a person, idea or situation (Engelbrecht & Green, 2007: 142). Attitudes are closely related to one's opinions and are based upon previous experiences. Attitudes often relate in some way to interaction with others and represent a vital link between social and cognitive psychology.

Attitudes towards inclusive education and commitment to Education for All constitute a critical challenge in terms of the impetus to inclusive education. According to Engelbrecht and Green (2007: 142) the *Education Labour Relations Council Integrated Report of 2005* shows that the morale of teachers in South Africa is generally low. The report identified some of the key issues that create job

dissatisfaction as stress associated with curriculum implementation (the then OBE) and administration, stress with curricula, pass rate requirements and reporting, high workload and having to perform tasks that are not included in the job description. It is clear from this report that stress associated with new curricula is a major challenge. If teachers are unable to implement the curriculum effectively, the dream of addressing the needs of all learners will never come true. The low morale expressed by the teachers will not disappear unless working conditions are improved and appropriate training is provided.

Williams and Finnegan (2003:40) believe that people's perceptions determine their actions. Schechtman and Orr (in Swart & Pettipher, 2005:177) argue that a person's perception and attitude are often related directly to learning experiences provided by the environment and the generalised belief systems of society which also have a direct influence on the way in which one responds to the world. It therefore seems that 'attitudes' may have a cognitive (learned) component, an emotional (affective) component and a component of observable behaviour. In other words, if the teacher feels positive about a certain aspect (based on his/her belief system), it will have a positive influence on his/her behaviour. Watkins (2007:51) points out that the attitudes held by a mainstream class teacher regarding inclusion, assessment and hence inclusive assessment, are crucial. Positive attitudes can be fostered by the provision of appropriate training, support and successful practical experiences.

Avramidis and Norwich (2002:130) explain that teachers are a key element in the successful implementation of inclusive policies and their perceptions of inclusive policies will not only determine their acceptance of those inclusive policies, but it will also affect their commitment to implementing such policies. This view is also held by both Cook (2001:204) and Reynolds (2001:476) who add that teachers' attitudes towards learners with specific needs appear to influence the type and quality of teacher-learner interactions which directly impact on the learners' educational experiences and opportunities. Teachers are now obliged to seek ways to instruct all learners in their classrooms whilst paying special attention to the physical

environment, instructional strategies employed, classroom management techniques as well as educational collaboration. These changes must result in fundamental alterations in the way teachers think about knowledge, teaching, learning and their role in the inclusive classroom (Carrington & Robinson (2004:147).
If teachers' cognition is addressed by supplying them with well-planned information about inclusive education, it could influence their motivation which could ultimately change their attitudes. Talmor, Reiter and Feigin (2005:220) point out that research has shown that there is a correlation between positive attitudes of teachers to the mainstreaming of learners with special needs, the support they receive from management as well as other more technical variables. These variables include availability of adequate resources, smaller classes, availability of time to design special teaching materials, and opportunities for personal development gained from further learning.

As stated earlier, the primary condition for successful inclusion of learners with special needs in the regular classroom is a change from negative to positive attitudes of regular school teachers towards learners with special needs and their inclusion in the regular classroom. Another necessary condition for the successful implementation of inclusion is continuous support and assistance to teachers by others (Talmor *et al*., 2005:221).

It is believed that by addressing the reasons for negative attitudes to inclusive education among teachers, and by supplying well-planned training that considers their attitudes relating to inclusive education and their support needs, positive attitudes to inclusive education could be established and maintained.

According to Swart, Engelbrecht, Eloff and Pettipher (2002:183), fear of not being able to manage diversity results in feelings of hopelessness which lead to learners being referred for assessments by specialists and subsequently placed in special programmes. They further argue that specific concerns associated with attitudes include the lack of educational and teacher support, insufficient facilities,

infrastructure and assistive devices. Negative attitudes and labelling result from misconceptions and assumptions about learners with specific educational needs and the potential effect inclusion may have on these learners as well as other learners in the classroom (Swart *et al*., 2002:185). Engelbrecht *et al.* (2002:69) single out administrative issues, the behaviour of the learner, the teacher's perceived self-competence and the parents of the learner with specific educational needs as possible stressful areas for South African teachers in the implementation of inclusive education. They conducted a study which showed that administrative issues that worried teachers include having to take full responsibility for the learner with specific education needs as well as for all the other learners in the class. Further administrative issues included adapting the curriculum, adjusting lesson plans and obtaining funds for necessary support. With regard to the learners' behaviour, poor communication skills and short attention span appeared to place stress on teachers. The teachers' perceived lack of competence as a result of reported inadequate pre-service or in-service training to prepare them for inclusive education, also caused them to stress. Issues pertaining to the parents of the learners with specific needs included limited contact with parents and their perceived lack of understanding of the learner's capabilities (*ibid*.:69).

2.5.6 Fostering and promoting parental recognition and involvement

The role of parents as partners in their children's learning and school life need to be supported and upheld. Parents have a key role in screening, identification, assessment and support of their children for effective decision-making regarding the nature and extent of the support their children require. When parents take an active interest in their children's teaching, learning and assessment, it enhances inclusion. In the case of certain disabilities and illnesses, it is imperative that the parents consult community-based clinics and/or other professional practitioners (including teachers) in order to conduct an initial assessment and to plan a suitable course of action for the learner. Alant and Harty (2005:84) propose general newsletters that can assist in keeping parents informed of school programmes and developments.

This is particularly important for boarding schools where distance works against parental involvement and participation in the school. They point out that information sessions and workshops are also effective to facilitate a better understanding of their children and their emotional and behavioural problems. Staff from district-based teams, including psychologists and social workers, could assist at such workshops. Where appropriate, school-based support teams should be strengthened by expertise from the local community, district-support teams and higher education. Schools need to be informed about, and become responsive to the communities from which their learners come. Issues of poverty, crime and violence also have an impact on learning (*ibid*.:85-87).

2.6 CONCLUSION

According to Swart and Pettipher, (2005:17) inclusion is about all learners and not only about disability, but mainly about ways and means of responding to all learners' varying individual needs. Inclusion is also concerned with the cultivation and creation of a school culture which welcomes and celebrates differences and recognizes individual needs. Inclusion can therefore not be separated from school reform as well as from educational change in the broader sense. It requires changing the culture and organization of the school so as to create sustainable systems and structures which develop and support flexible and adaptable approaches to learning. Swart and Pettipher (2005:21) believe that a South African inclusive education system can and should be an important tool for creating a truly democratic society.

This chapter provided an overview of the background of inclusion in an international context and also of how policy development took place in South Africa. Emphasis was placed on how inclusion should be implemented on national, provincial and district level, as well as on the inclusive school and the practical implementation of inclusive strategies and guidelines at classroom level. A key question that needs to be answered in this study is: To what extent, if at all, are the theoretical insights and guidelines as prescribed in the policy documents implemented effectively within

districts and schools? Are principals and teachers equipped with the necessary skills, knowledge and competencies to deal with inclusion on the different levels, and how do they perceive the success of the implementation of inclusive guidelines and policies? The next chapter attempts to answer these questions and reports on the situation in selected primary schools in the Lejweleputswa district of the Free State province.

CHAPTER 3
RESEARCH DESIGN AND METHODS

3.1 INTRODUCTION

In chapter two the literature review provided a theoretical foundation on policy prescripts and guidelines that can be used to ensure effective implementation of inclusive education in public primary schools. This chapter intends to bring about the context in which, and purpose for which, the collection of data will take place. The chapter therefore provides an account of how the qualitative investigation was designed and how it was conducted. It also covers the method of investigation that includes data-gathering techniques and the design of the research.

The chapter further provides the research design which explains the procedure followed to conduct the study. The research design includes the statement of subjectivity, selection of informants, transcription of data, analysis of data, reliability and validity of the study and ethical measures that were considered during the research proceedings. The role of the researcher will also be detailed in this chapter in order to clarify ethical research proceedings.

The information was gathered in order to actualize the objectives of the research and to determine the perceptions of participants on the challenges that are faced in the implementation of inclusive education in the Lejweleputswa district. It is imperative to establish the meaning attached by the participants to the effects exclusion and inclusion of learners with learning barriers have on the process of learning. The information gathered included focus group interviews with the school-based support teams of the schools under investigation and open-ended questionnaires which were completed by the respective principals.

3.2 RATIONALE FOR EMPIRICAL RESEARCH

The researcher is currently teaching in one of the selected schools. The rationale for choosing empirical research was to hear the voices of teachers and principals regarding the practical implication of inclusion and to answer the research questions.

3.3 RESEARCH DESIGN

The research design refers to the plan and structure of the investigation used to obtain evidence to answer the research questions (McMillan & Schumacher, 2006:22). The design describes the procedures for conducting the study, including when, from whom, and under what conditions the data was obtained. In other words, design indicates how the research was set up, what happened to the subjects and what methods of data collection were used. The purpose of a design is to provide the most valid, accurate answers possible to research questions. Du Plessis (2005:148) also adds that design refers to the researcher's plan on how to proceed with the research.

This research was qualitative in nature as it was conducted in a natural setting. This implies that there was no manipulation of variables, simulation or an extremely imposed structure on the situation. The research was intended to begin with a planning phase (Hoberg,1999:77) in which general research questions, the kind of site and types of participants needed to be identified in accordance with McMillan and Schumacher (2006:322-323). This approach was chosen because it gave a clear understanding of the participants' views and experiences and it captured participants' perceptions as they occurred naturally (Wiersna & Jurs 2009:232) and in their actual words (Johnson & Christensen 2011:18). For this particular study the researcher conducted focus group interviews with school-based support teams whilst an open ended questionnaire was completed by principals. These interviews were conducted in order to capture their perspectives on how to deal with problems of learners experiencing barriers to learning. Semi-structured and open-ended

questions were used to provide the participants with every opportunity to describe and explain what is most salient to them. Verbatim words and phrases from the interviewees were then analysed and used as data to illustrate the findings.

For this study a qualitative approach was suitable as it provided the necessary information to achieve the objectives of the research, namely, to investigate the implementation of inclusive education in public primary schools in the Lejweleputswa district. A qualitative approach was deemed suitable because the purpose of the study is to determine the perceptions of participants on applicable inclusion strategies. Mothata (2000:136) describes qualitative research as a research technique used to collect and present data in the form of words, rather than numbers. According to Bazeley (2007:2) qualitative methods are chosen in situations where a detailed understanding of a process or experience is wanted, where more information is needed to determine the exact nature of the issue being investigated, or where the only information available is in non-numeric form.

The research design has an element of constructivism as it focuses on the perspectives, feelings and beliefs of the participants (McMillan & Schumacher 2010:347). The researcher considered the participants' views, described them within a natural setting or context (which is a school) and explored the meaning participants attach to inclusion of learners experiencing barriers to learning in primary schools, these being the central perspective of constructivism or a naturalistic inquiry (Creswell 2012:429). Qualitative researchers focus on individuals' social actions, beliefs, thoughts and perceptions. In this approach data was collected through interaction with research participants in their natural settings such as schools without manipulation of variables, simulation or externally imposed structures in the situation.

The use of interviews in qualitative research is usually characterised by three features of ethnographic interviews (McMillan & Schumacher, 2010:355). These, as applied to this study, are the following:

- Interviews are conducted with school-based support teams to capture participants' perceptions of inclusive education and their problems while dealing with learners experiencing barriers to learning.
- Semi-structured and open-ended interviews are used to provide participants with opportunities to describe and explain the most salient issues affecting inclusive education.
- Verbatim words and phrases from the interviews will be analysed and used as data to illustrate the findings.

According to Denscombe (2003:267) qualitative research is an umbrella term that covers a variety of styles of social research. It is any kind of research that produces findings not arrived at by means of quantification. It may refer to research about peoples' lives, stories, behaviour and organisational functioning, social movements or interaction and relationships.

3.4 ETHICAL MEASURES

In any kind of research there are legal and technical accessibility considerations as well as ethical guidelines which have to be adhered to. According to McMillan and Schumacher (2011:15) these guidelines include informed consent, avoiding deception, ensuring confidentiality and anonymity, avoiding harm to subjects, and respecting privacy. The following is a discussion of the ethical measures the researcher has constantly considered throughout the research process in order to guide and assist the empirical investigation.

3.4.1 Informed consent

Before conducting this study the researcher sought permission from the Strategic Planning, Policy and Research Directorate of the Free State Department of Education to conduct research in the five primary schools in the Lejweleputswa District. Permission was also sought from the school principals before entering their

premises and collecting data, since obtaining permission from organisational personnel required contacting them before the start of the study (Creswell 2012:231). Likewise, informed consent from all the prospective participants (principals and teachers in the school-based support teams) to participate in the study was obtained after having informed them of its purpose, the procedure to be followed, the risks, benefits, alternative procedures and the measures implemented to ensure confidentiality (Johnson & Christensen 2011:107).

3.4.2 Voluntary participation

The researcher informed all participants that their participation in the study is completely voluntary since participants cannot be compelled, coerced or required to participate in a study against their will. Participants were also informed that the freedom to participate or not to participate is a basic right which includes the freedom to withdraw from the research at any time without penalty (McMillan & Schumacher 2010:118). In this way it was ensured that coercion to participate or to remain a participant was not applied and the participants were not exploited in any way, thereby upholding the highest ethical code.

3.4.3 Anonymity and confidentiality

The participants were assured that all the information provided by them would be held in strict confidence and that their identities would not be revealed in any record or report and that there would be no link between the data and the participants (McMillan & Schumacher 2010:121). Furthermore, settings (such as schools) and participants would not be identifiable in print to ensure their anonymity and confidentiality. Participants were requested not to include their names and addresses, nor the names and addresses of their schools. In this way, confidentiality was ensured because the data would not be linked to individual participants by name. Code names for people and places were used to ensure anonymity. In this

way, neither the names of participants who provided the information, nor their identities would be known to anyone and thus their privacy was duly protected.

3.4.4 Permission to tape-record interviews

The researcher used the qualitative interview approach to gather information-rich data about the participants' thoughts, beliefs, knowledge, reasoning, motivations and feelings about inclusive education and inclusion of learners experiencing barriers to learning. Johnson and Christensen (2011:202) point out that this process allows a researcher to enter into the inner world of another person and to gain an understanding of that person's perspective.

In order to capture this information without missing any vital piece, all the interviews were tape-recorded. All participants were informed before the start of the interviews that their responses would be tape-recorded and that they had the right to withdraw from the study if they felt uncomfortable or intimidated by the presence of the tape recorder. The taping of the interviews never proceeded without the knowledge and consent of the participants. In this way, deception was avoided, thus upholding the highest level of professional integrity and objectivity.

3.5 MEASURES TO ENSURE TRUSTWORTHINESS

3.5.1 Participants' language

In order to avoid sophisticated language or abstract inclusive education terms, the interviews were conducted in the participants' language of teaching and learning, which in this case is English. Simple language was employed to ensure maximum understanding on the part of the participants.

3.5.2 Field research

The interviews took place at the schools which are the natural settings of the participants in order to reflect the reality of their lived experiences. This approach reflects the reality of their experiences more accurately than the contrived or laboratory settings would.

3.5.3 Statement of subjectivity

Qualitative research should respond to concerns that the natural subjectivity of the researcher will shape the research (Creswell, 2012:277). The researcher was mindful of the fact that he should gain some understanding and empathy for the research participants in order to gain entry into their world. The success of qualitative research depends on the willingness of the participants to participate. Thus, the researcher tried by all means to gain the trust and confidence of the participants. In addition, Mazibuko (2003: 46) says trust should be developed before people are willing to release certain kinds of information. The researcher should find rapport with all participants before and during the interviews and give participants freedom to express their views without fear of any kind of judgment during the interview process. The opinions of the participants were respected and trusted. Guiding questions put to participants were aimed only at eliciting elaboration on a particular piece of information. Any kind of personal influence on the part of the researcher was avoided at all costs.

3.5.4 Verbatim accounts

Verbatim accounts (the lowest inference descriptors) were used as the participants' exact words were provided in direct quotations (Johnson and Christensen 2011:267). The researcher extracted the verbatim accounts as well as direct quotes from the transcripts to illustrate the sense, intentions, feelings, tone and emotions of participants.

3.5.5 Low-inference descriptors

The researcher used concrete, precise descriptions from field notes and interview elaborations (McMillan and Schumacher 2010:331). Low inference descriptors (literal descriptors) as opposed to abstract scientific language were used in order to present the participants' actual language, dialect and personal meanings.

McMillan and Schumacher (2010:331) mention that tape recorders and other audio-visual equipment provide accurate and relatively complete records of conversations between people. For the purposes of this study, a tape recorder was used to record the interviews.

3.6 RELIABILITY AND VALIDITY

Johnson and Christensen (2011:264) explain that qualitative research validity refers to qualitative research that is plausible, credible, trustworthy and therefore defensible. McMillan and Schumacher (2010:175) describe validity of qualitative designs as the degree to which the interpretations and concepts have mutual meaning for the participants and the researcher; the researcher and the participants should agree on the descriptions and meanings of different events. Mazibuko (2003:44) maintains that validity and reliability of the research are crucial in all social research regardless of disciplines and methods employed. Collected data must be accurate, authentic and representative of reality. Regardless of the form research takes or the end to which it is directed, researchers want research to be valid. On the other hand, Davies and Mosdell (2006:27) refer to the concept of internal validity. They state that internal validity means making sure that findings are as reliable as they can be by eliminating all possible sources of error in the way the study is designed.

3.6.1 Reliability

Reliability in qualitative research refers to the consistency of the researcher's interactive style, data recording, data analysis and interpretation of participant meanings from the data (McMillan & Schumacher, 2010:177). Creswell (2012:164) asserts that using a combination of data types increase reliability and validity as the strengths of one approach can compensate for the weakness of another approach. Bearing this in mind, the researcher opted for the use of multiple data types. In addition, Denscombe (2003:273) maintains that the criterion of reliability pertains to whether the research instruments are neutral in their effect and would measure the same result when used in other instances. Denscombe (2003: 273) further states that measures to enhance reliability involve a complete description of the research process so that an independent researcher may replicate the same procedure in comparable settings. This includes a delineation of the physical, cultural and social contexts of the study, a statement of the researcher's role in the research setting, an accurate description of the conceptual framework of the research and a complete description of the methods of data collection and analysis.

In pursuit of reliability, the researcher provided an explicit account of the aim of the research and its basic premise, how the research was undertaken, and the reasoning behind key decisions made in relation to aspects such as sampling.

The researcher collected data through tape recordings and also requested one of his colleagues to help jot down notes while he was busy with the interviewing and recording. The researcher employed a range of techniques in a single study to corroborate findings for reliability, including the use of mechanically sophisticated methods of recording, transcribing and analysis. The same corroboration was done with school principals. The researcher revisited the schools to meet the School-based support teams for comparison and corroboration in order to refine ideas and to ensure the match between the research-based categories and the participants' reality.

3.6.2 Validity

The researcher was aware of researcher bias that was a potential threat to validity, resulting from selective observations and selective recording of information and also from allowing one's personal views and perspectives to affect how data is interpreted and how the research is conducted. The researcher guarded against subjectivity by keeping a memo that would alert him during data analysis. During and immediately after the interview, the researcher scribbled notes which covered emotions, gestures, levels of emphasis and any kind of sensitivity displayed by participants.

3.7 RESEARCH METHODS

3.7.1 Selection of participants

Qualitative research uses small samples of people nested in their context and studied in depth (McMillan & Schumacher, 2010:354). Hoberg (1999:58) agrees that in qualitative research, a small, distinct group of participants should be investigated to enable the researcher to understand the problem in depth, as is the case with this study. For purposes of this study, judgment sampling was applied in selecting the informants. Judgment sampling involves a deliberate choice of informants on the basis of specific qualities which endow them with special knowledge that the researcher values. For the purposes of this study, school-based support teams were specifically selected because of the specific work that they do with learners experiencing barriers which includes, among other things, referring them for professional therapy.

McMillan and Schumacher (2010:351) postulate that the researcher may select a participant on the basis of age, position in an organisation or some other characteristic. In the case of this research, the principals of the schools under investigation were selected because of their position in the institution.

Five primary schools with their principals were selected because of their proximity to the researcher's place and their varying nature and categorization:

- One farm school
- One former model C school
- One private school
- Two public primary schools in the township

The participants as selected above can also be labelled as key informants. Key informants are individuals who possess special knowledge, status or communication skills and are always willing to share that knowledge and skills with the researcher.

3.7.2 The role of the researcher

In any study it is important to explain the role of the researcher for clarity and role identification purposes. The researcher is expected to ask for permission to conduct interviews on the identified sites, in this instance, from the departmental officials and school principals. In qualitative research the researcher is directly involved in the setting, interacts with people, and is the "instrument" (De Vos, Strydom, Fouche & Delport 2005:359). The researcher served as an instrument in this study since all the responses of participants were collected and analysed by him. In this study the researcher talked to teachers who are members of the school-based support teams and recorded this information on a voice recorder that complimented field notes. Walliman (2005:96) states that the researcher is interested in how the subjects of the research talk about their experiences and views rather than imposing views from outside. The researcher, therefore, is expected to be competent, skilled and adequately prepared to undertake the proposed investigation to produce reliable and valid information (McMillan & Schumacher 2010:12). Du Plessis (2005:154) supports this statement by maintaining that validity in qualitative methods hinges to a great extent on the skills, competence and the rigour of the person doing the field work.

It is the duty of the qualitative researcher to establish a good relationship with the participants so that they feel free to communicate their experiences. In addition, Goddard and Melville (2001:49) point out that the researcher must remember that the subjects are individual human beings who should be treated with appropriate respect. The qualitative researcher should strive to build a relationship of reciprocal trust and rapport with the subjects. The quality of data therefore depends on this rapport in so far as it increases the likelihood of participants sharing authentic knowledge of their life world. According to Walliman (2005:241) the researcher should avoid leading questions, excessive guidance and other factors which may cause distortion. The researcher should collaborate with the participants in a professional manner in order to acquire the required information.

According to Hoberg (1999:83) the researcher is a curious learner who comes to learn from and with the research participants. The researcher is not expected to go to the field as an expert or a figure of authority. In the case of this research, the researcher showed confidence and actively interacted with participants in different ways to solicit information about the school-based support team's role in responding to educational needs of learners experiencing barriers to learning. The researcher developed an interview guide with topics that facilitated discussion with the participants. McMillan and Schumacher (2010:355) recommend that the interview guide topics should be selected ahead of time but that the researcher decides on the sequence and wording of questions during the actual interviews.

3.7.3 Data collection strategies

The data collection phase involved identifying and selecting individuals for study, obtaining their permission to be studied and gathering information by administering instruments such as asking them questions or observing their behaviour (Creswell, 2012:151). Data collection strategies were selected taking into consideration the focus of the research and desired time-frame of the study. The researcher identified schools whose principals and school-based support teams would take part in focus

group interviews for the purpose of this study. Goddard and Melville (2001:49) postulate that the advantages of interviews are that the researcher can ask the participants to clarify unclear answers and follow up on interesting answers. According to McMillan and Schumacher (2010:329-320) data collection and analysis are interactive research processes that occur in overlapping phases.

The phases are as follows:

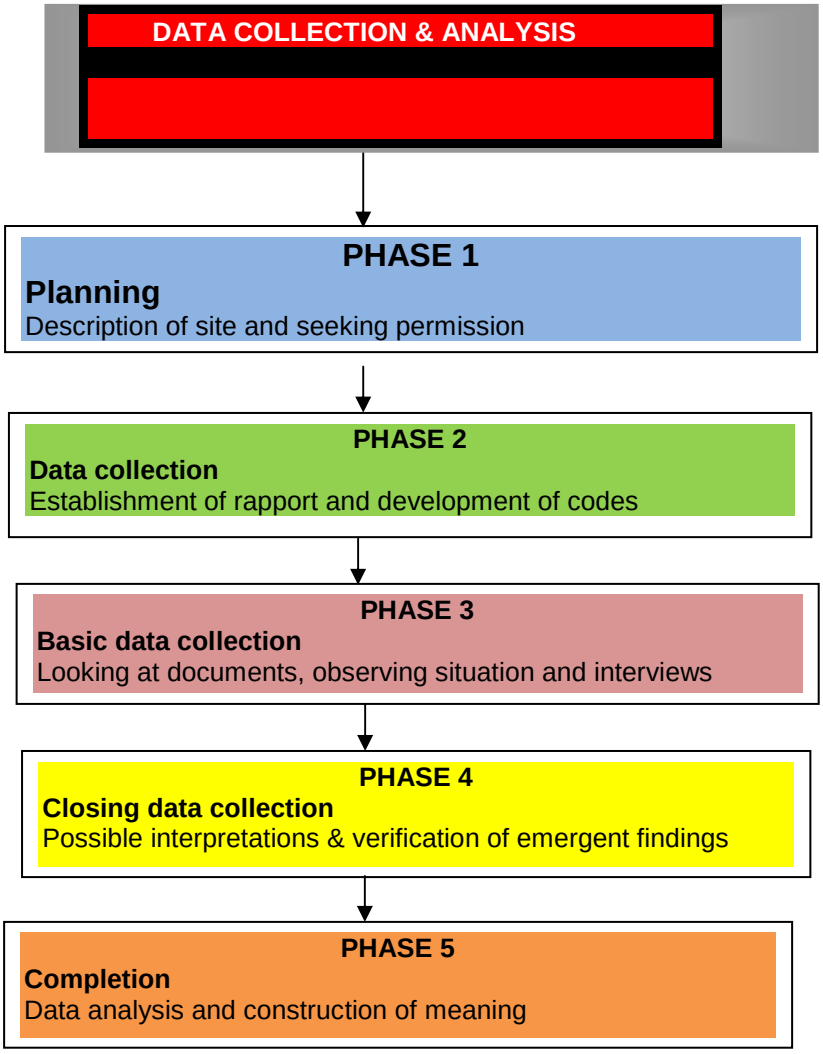

Figure 3.1: Data collection and analysis phases

- Phase 1: Planning

The researcher described the kind of setting or site and the kind of interviewees or documents that would seem logical to yield information about the problem. In this phase the researcher located and gained permission to use the site, a network of persons or an archive of documents.

- Phase 2: Beginning data collection

The researcher established rapport, trust and reciprocal relations with the individual and groups to be observed. In this phase the researcher organised a way to develop codes and retrieve collected data for analysis that took place in phase five.

- Phase 3: Basic data collection

During this phase the researcher looked at various referral forms and supporting documents used to assist learners experiencing barriers. The researcher began to hear, see and read what is going on rather than only to listen.

- Phase 4: Closing data collection

The researcher paid more attention to possible interpretations and verification of the emergent findings with key informants, the remaining interviews, and the documents. The researcher sensed that further data collection would not yield any more data relevant to the problem.

- Phase 5: Completion

The researcher started with formal data analysis and construction of meaningful ways to present data. The researcher reconstructed initial diagrams, time charts,

network diagrams, frequency lists, processes, figures and other information to gain a holistic sense of the totality and the relationship of parts to the whole.

3.7.3.1 Interview schedule

According to McMillan and Schumacher (2010:206) a questionnaire devised to guide interviews is called an interview schedule or guide. This provides the researcher with a set of predetermined questions that might be used as an appropriate instrument to engage the participant and designate the narrative terrain. De Vos *et al.* (2005:302) also emphasise that the provision of a schedule beforehand forces the researcher to think explicitly about what he/she intends the interview to cover. It forces the researcher to think of difficulties that might be encountered, e.g. in terms of question wording or sensitive areas.

McMillan and Schumacher (2010:355) further argue that topics in the interview guide are selected in advance, but the researcher decides on the sequence and wording of the questions during the interview. With reference to the research aims and objectives the researcher drew up an interview guide that would assist in reaching the intended conclusions of the study. The main themes in the interview guide were the implementation of inclusive education in selected primary schools and possible strategies to be employed by the principal, teachers, school-based support teams and district officials to assist with the inclusion of learners experiencing barriers to learning.

3.7.3.2 Pilot study

In order to test whether the questions to be asked in the study were clear and unambiguous before using them in the actual research interviews, a pilot study was conducted (Johnson & Christensen 2011: 183). The pilot study was conducted informally with two primary school teachers to test whether the questions asked were

relevant, appropriate and in line with the problem being investigated. Furthermore, the aim of the pilot test was to find answers to the following questions:

- Are the questions easy to follow?
- Are the questions relevant to what the research aims to accomplish?
- Is there a good flow of questions in the interview guide?
- How long does it take to answer the questions?

3.7.3.3 Focus group interviews

Focus group interviews were used to elicit data from a group of people on a specific topic or theme (Denscombe, 2003:169). Focus groups are generally regarded as a useful way of exploring attitudes on non-sensitive, controversial topics. They can elicit contributions from interviewees who might otherwise be reluctant to contribute, and through their relatively informal interchanges, they can reveal insights that might otherwise not have come to light through the one-to-one conventional interviews.

McMillan and Schumacher (2010:363) regard the focus group interview as a strategy for obtaining a better understanding of a problem or an assessment of a problem. This type of interview can concern a new product or idea by consulting a purposefully sampled group of people rather than each person individually.

With the help of the principal, the researcher met with the school-based support teams. The interviews were conducted with a group of educators who are members of a school-based support team. The researcher explained the purpose of the interview to the group as well as procedures to be followed at the beginning of the interviews.

3.7.3.4 Field notes

Field notes (recordings of observations and reflections on them) were kept throughout the empirical phase of the research with regard to the observations made, during the pilot study as well as the focus group interviews (McMillan & Schumacher 2010: 364). Descriptive field notes included a description of the interview process and how it unfolded while reflective field notes included the researcher's thoughts, insights and hunches as the interview proceeded (Creswell, 2012:217). Apart from transcribing all the focus group recordings, field notes were compiled to compare them against recorded information. Other field notes included participants' comments and tentative interpretations made by the researcher during the data collection and analysis procedures.

3.7.3.5 Open-ended questionnaire

Education legislation requires of the principal to be the champion of the curriculum by virtue of his position in the school. This implies that principals should master the curriculum and ensure that it is delivered appropriately to all learners including those experiencing barriers to learning. The researcher personally delivered open-ended questionnaires to principals of the selected schools. Descombe (2003:169) states that open-ended questionnaires allow respondents to write a free response in their own terms, to explain and qualify their responses and avoid limitations of pre-set categories of response. The main function of this questionnaire was to allow principals to reflect on the state of their schools' progress with regard to its response to educational needs of learners experiencing barriers to learning as well as the strategies the school employs to help such learners.

3.8 DATA PROCESSING

3.8.1 Transcribing the data

Bazeley (2007:44) supports the idea that transcribing involves translating from an oral language, with its own set of rules, to a written language with another set of rules. Transcripts are not copies or representations of some original reality; they are interpretative constructions that are useful tools for given purposes. According to Bazeley (2007:45) there is always the danger that transcribed words may lose some meaning as tone, volume, emotionality and accompanying facial and body gestures and disposition cannot be portrayed.

Having conducted the pre-arranged interviews, the researcher transcribed all tape-recorded interviews verbatim immediately after the interviews had occurred. The transcription was done by the researcher himself in order to retain the form and style of the participants' expressions. The aim in transcribing the data was to ensure a pragmatic approach in dealing with the data which is also as true as possible to the conversation. Separate notes were compiled to record any body language accompanying the transcripts during and immediately after the interviews.

Bazeley (2007:45) provides suggestions which could be kept in mind when transcribing the data:

- A full transcript will include all 'ums', 'mmms', repetitions and the like. Repetition communicates something about the thinking or emotion of the interviewee.
- In the same vein, do not correct incomplete sentences or poor grammar: it is important to capture the form and styles of the participant's expression.
- Note events which create interruptions to the flow of the interview, for example, "tape off" or "telephone rings". Also note other things that happen which may influence interpretation of the text.

- Record non-verbal and emotional elements of the conversation, such as (pause), (laughter), (very emotional at this point). Emotional tone and the use of rhetoric are important to record. For example, something said sarcastically, if simply recorded verbatim, may convey the opposite of the meaning intended.
- If one of the speakers (or interviewer) is providing a non-intrusive affirmation of what another is saying, one option is to record that affirmation simply by placing it in parentheses or square brackets within the flow of text [Int:mmm], rather than beginning a new paragraph and unnecessarily breaking up the text flow.
- Digressions from the topic of the interview is a controversial issue. The decision about whether or not to include digressions depends on whether there is any meaning in the digression. Unless there is clearly significance in what was said, it is usually sufficient to skip the detail of that part of the conversation.

The researcher applied most of the above-mentioned measures especially during the focus group interviews with school-based support teams.

3.8.2 Analysis and interpretation of the data

Data analysis is a process of bringing order, structure and meaning to the mass of collected data (De Vos *et al.,* 2005:340-341). Qualitative data analysis is a search for general statements about relationships among categories of data. McMillan and Schumacher (2010:367) explain qualitative analysis as a process of interim discovery analysis aimed at developing coded topics and categories that may initially come from the data or which may be predetermined, and also pattern seeking for plausible explanations. The researcher initially reads the transcripts and the notes repeatedly in order to gain familiarity with them. Creswell (2012:244) adds that reading, reading and reading once more through the data forces the researcher to become familiar with the data in intimate ways. The researcher listened to all

recordings of the interviews, at the same time confirming the accuracy of the transcriptions.

The researcher searched through the data for regularities, patterns and topics and wrote words and phrases to represent those topics and patterns. The data was then divided into manageable topics or categories. The emergent patterns or categories were colour-coded. The emphasis on emic categories in data collection was preferred. Emic categories are explanations of what the phenomenon means to the participants (McMillan & Schumacher, 2010:244).

3.9 SUMMARY

This chapter dealt with research methodology and provided information on how the research was conducted. The chapter covered the use of a qualitative approach to research and it described the methods to be used to obtain and analyse research data with adherence to requirements of validity, reliability and ethics.

In the next chapter the focus is placed on the practical conducting of the interviews, the interpretation of the data, and the presentation of the results and findings.

CHAPTER 4

DATA ANALYSIS AND INTERPRETATION

4.4 INTRODUCTION

In chapter three, the research design and methodology used in this study were clearly outlined. Various ethical considerations in conducting the research as well as measures to ensure trustworthiness were explained in detail. In-depth interviews were conducted at five primary schools in the Lejweleputswa district of the Free State province. This chapter analyses the findings of the focus group interviews as well as those of open-ended questionnaires for the principals of the five selected primary schools and provides a detailed interpretation.

According to McMillan and Schumacher (2010:367) qualitative data analysis is primarily an inductive process of organizing the data into categories and identifying patterns among the categories. The findings were guided by the literature study conducted in chapter two. The interviews were tape-recorded and transcribed verbatim. At each of the five primary schools, detailed interviews were conducted with school-based support teams. A more detailed profile of the participants of the five primary schools appears in the following section.

4.2 THE PROFILE OF PARTICIPANTS

At each of the five primary schools interviews were conducted with five teachers who are members of the school-based support teams (as members of the focus groups). To this end, open-ended questionnaires were distributed to and completed by principals of the five selected schools.

In order to ensure that the principle of confidentiality was executed clinically, each of the schools was coded as follows: school A, school B, school C, school D and school

E. Each of the principals was coded as follows: the principal of school A, the principal of school B, the principal of school C, the principal of school D and the principal of school E.

In each school the five participating teachers consisted of a fair combination of males and females and their responses were coded as school A (T1-T5), school B (T1-T5), school C (T1-T5), and so on. However, in two schools (schools C and D) there were fewer than five teachers that participated (See table 5.1). This was due to the non-availability of the participants and the circumstances at the school on the day of the interview. In total, five principals completed the open-ended questionnaires and twenty-three teachers participated in the interviews. The system of coding used ensured that there was no link between the data and the participants, or between the data and the settings, thereby ensuring the anonymity of the participants and the confidentiality of the data (McMillan & Schumacher 2010:121). Table 4.1 depicts the participant profile in specific detail.

TABLE 4.1 PARTICIPANT PROFILE AND CODING (SBST)

SCHOOL	**TEACHER(T) INTERVIEW (FOCUS GROUP)**	**NUMBER OF TEACHER PARTICIPANTS**
A • **500-1000 learners** • **Township** • **Hennenman**	T1 T2 T3 T4 T5	5
B • **500-1000 learners** • **Township** • **Hennenman**	T1 T2 T3 T4 T5	5

TABLE 4.1 PARTICIPANT PROFILE AND CODING (CONTINUED)

SCHOOL	TEACHER(T) INTERVIEW (FOCUS GROUP)	NUMBER OF TEACHER PARTICIPANTS
C • **16 learners** • **Rural** • **Farm in the Hennenman district**	T1 T2	2
D • **Private** • **200-500 learners** • **Welkom**	T1 T2	2
E • **Ex- Model C** • **500-1000 learners** • **Ventersburg**	T1 T2 T3 T4 T5	5

4.3 IDENTIFICATION OF THEMES AND CATEGORIES

In order to analyse and interpret the large volume of raw data collected through the process of consulting written records and conducting interviews, a qualitative data analysis process was followed. During the first scanning the information was read through carefully.

From the readings the researcher identified ‘units of information’ that served as the basis for defining or representing categories. A ‘unit of information’ refers to a

sentence or paragraph that has the following two characteristics: First, it is aimed at the understanding that the researcher needs to have and second, it is the smallest piece of information about something that can stand by itself (Brown 2004: 104). 'Carefully' means to read and re-read the transcripts and listen and listen again and again to the tape recording of the interviews in order to formulate reality from them (Brown 2004:104).

During the second scanning it was coded or categorised and during the third scanning the main themes were generated (Creswell 2012:247). The development of these themes and categories was guided by aims and objectives of the study. This process of categorizing the information assisted the researcher in content analysis and interpretation (Wiersma & Jurs 2009:216).

The main themes identified in the interviews were as follows:

- Effectiveness of school-based support teams
- Educators' role and resourcefulness
- Level of support from District based support team
- Possible improvements in the implementation of inclusive education in the Lejweleputswa district
- Other known barriers to learning prevalent in schools

Table 4.2 clearly outlines the main themes and categories which guided the analysis and findings of the study on focus group interviews.

TABLE 4.2 MAIN THEMES AND CATEGORIES (INTERVIEWS WITH SBST)

THEME 1	**EFFECTIVENESS OF SCHOOL-BASED SUPPORT TEAMS.**
Category 1	Strengths
Category 2	Weaknesses
Category 3	Areas for strengthening

THEME 2	**EDUCATORS' ROLE AND RESOURCEFULNESS.**
Category 1	Educator's role
Category 2	Resources
Category 3	Additional skills needed
Category 4	Support strategies

THEME 3	**SUPPORT FROM DISTRICT BASED SUPPORT TEAM**
Category 1	Support to school-based support teams
Category 2	Support referred learners
THEME 4	**POSSIBLE IMPROVEMENTS IN THE IMPLEMENTATION OF INCLUSIVE EDUCATION IN THE LEJWELEPUTSWA DISTRICT**
Category 1	Improvements at school level
Category 2	Improvement at district level
THEME 5	**OTHER KNOWN BARRIERS PREVALENT IN SCHOOLS**
Category 1	Systemic barriers a) Overcrowded classes b) Language of teaching and learning (LOLT)
Category 2	Pedagogic barriers a) Lack of support for teachers b) Inappropriate teaching and assessment

Category 3	Socio-economic a) Poverty b) Orphanage and child headed households c) Illnesses d) Family instability and poor parenting
Category 4	Intrinsic barriers a) Ill-discipline and peer pressure

Table 4.2 focused on the main themes that emerged from the reading of the verbatim transcripts. Some categories have been omitted owing to the low frequency of responses from the participants. This is in keeping with the view held by Gay *et al*. (2011:469) who confirm that the task of interpreting data is to identify the important themes or meanings in data and not necessarily *every* theme. A detailed discussion of the research results will follow in the next section.

4.4 DISCUSSION OF DATA ANALYSIS (INTERVIEWS)

As can be seen in Table 4.2 above, five main themes are highlighted with each main theme consisting of various categories. These themes and categories will now be discussed in detail to present the major findings of this research based on focus group interviews. In addition, applicable verbatim quotes obtained from the raw data will be used to confirm and justify important findings.

4.4.1 Effectiveness of school-based support teams

Landsberg *et al.* (2005:66) argue that whether the school is a special school as a resource centre, a full-service school or an ordinary school, it should establish a school-based support team which is responsible for the provision of learning support together with teachers involved in a particular teacher's teaching and learning activities. Teachers are expected to be dynamic, competent and innovative in their

teaching methods to accommodate the different learning styles of the learners (Morrisson,1998:70 in Landsberg *et al.*, 2005:66).

White Paper 6 (DoE 2001) states that the primary function of these teams is to put in place properly coordinated learner and educator support services through support to the teaching and learning process by identifying and addressing learner, educator and institutional needs.

4.4.1.1 Strengths

Teacher 2 of school A regarded the strengths of their School-based Support Team as being able to offer support to learners by addressing their behavioural problems which do not need a social worker.

From school B, teacher 1 conveyed that:

"Being able to refer learners for therapy is our greatest strength. We help them with clothes and food. We also….. visit learners' homes to look at the living conditions, talk to parents/ or guardians so as to get the background information of the learners."

Teacher 2 from school A stated as follows, after a short silence:

(Short silence, deep in thought) …. *"Giving support to other learners by addressing their problems like behavioural problems that do not necessarily need the attention of the social worker."*

When probed to outline how they offer support to other learners, teacher 3 said:

(Agitated)…. *"By addressing their problems. When a learner has a behavioural problem on a small scale we devise means to help the learner by reprimanding him*

or her and involve parents to consolidate and reinforce discipline from a learner's side."

When probed further on the kind of support they offer to a learner with learning difficulty, looking puzzled, teacher 1 from the same school said:

"What is it that can be done to such learners? Learners who are slow to learn are born and created like as they are, and we cannot change what has been created."

From school D, the greatest strength of their School-based Support Team is the involvement of parents from the onset and the fact that they engage private therapists to help learners for a minimal fee that is paid by the affected learners' parents.

For school E, which is a former model C school, teacher 1 declared as follows:

"The greatest strength of our school's SBST lies on our extensive consultation and involvement of different stakeholders like parents, all educators, school management team and district official on the special education section. Simply involving stakeholder opens a whole family of people who honestly want to help a learner to overcome barriers as well as an insight on the living condition at a learner's home"

Teacher 2 in school C said the following:

"The pillar of strength of our SBST is the qualified remedial teacher who has experience on special and remedial education"

This view was also expressed by teacher 3 from school E who proudly stated that:

"One complimentary factor on our strength is the fact that we have a devoted qualified remedial teacher who has a vast experience on remedial education."

4.4.1.2 Weaknesses

On the other hand, teachers from School C, which is a farm school, claimed that there is no School-based Support Team at their school.

Teacher C1 had this to say:

"If you are a two teacher school you cannot have a School-based Support Team. It becomes the responsibility of the two of you as teachers to identify learners experiencing barriers and report to the District Official when they visit the school. No learner has been referred for specialised therapy here due to the long and vast distance between our school and the office where help is"

In the same vein, teacher 2 from school B said:

"Other members of staff are less interested and therefore become passive."

4.4.1.3 Areas for strengthening

School A's school-based support team generally felt that the SBST can be made effective through every educator being actively involved and taking responsibility for identifying learners' problems in his/her subject and collectively designing a support package for such learners.

This view was supported by teacher 1 at school E who said:

"The strength of our School-based Support Team lies in our extensive consultation and involvement of different stakeholders like parents, all educators, school management team and district official on the special education section."

Schools A, B and E pointed out that they need constant support from district officials to monitor progress as well as speedy attendance to identified and referred learners for specialised attention.

From school C, the two teachers felt that they needed much more support in every area from trained personnel from the district office.

Teacher 1 from school E felt that all teachers have to work together with the support team and this view was put as follows:

"The rest of the teachers should work together with the school-based support team. We do not know all the learners with problems and we need the help of the teachers to identify the learners."

Both schools C and D mentioned parents' involvement as a stumbling block in some instances for learners to get help.

Teacher 2 from school C said:

"There are learners with barriers who could not be referred because parents are reluctant to participate in the referral process that has to be followed."

4.4.2 Role of educators and resourcefulness

In all classrooms learners have diverse learning needs and if teachers are not responsive to these needs and provide the necessary support, learners may experience barriers to learning. In responding to diverse learning needs of all learners in their classes teachers need suitable resources, teaching aids and they need to be resourceful as curriculum deliverers by being highly knowledgeable.

4.4.2.1 Educators' role

As alluded to in Chapter 2, Avramidis and Norwich (2002:130) explain that teachers are a key element in the successful implementation of inclusive policies and their perceptions of inclusive policies will not only determine their acceptance of those inclusive policies, but it will also affect their commitment to implementing such policies. This view is also held by both Cook (2001:204) and Reynolds (2001:476) who state that teachers' attitudes towards learners with specific needs appear to influence the type and quality of teacher-learner interactions, thereby directly impacting on the learners' educational experiences and opportunities. (See 2.9.5)

It is the responsibility of teachers to turn their classes into inclusive classrooms. In these inclusive classrooms some learners have special educational needs for a variety of reasons, either intrinsic or extrinsic, which have to be accommodated. No two learners are disabled in exactly the same way, therefore teachers in collaboration with support personnel has to develop a diagnosis and subsequently plan instructional programmes designed to achieve specific objectives appropriate for a particular learner.

The teachers' role in an inclusive classroom is the identifications of learner strengths concurrently with assistance in overcoming particular weaknesses by differentiating the curriculum as well as the methods used to deliver it. As far as differentiation of the curriculum is concerned, mixed-ability teaching requires a diverse range of strategies.

An important aspect to be differentiated in the curriculum is the content (Mitchell, 2008: 104) (See 2.8.2.1). This can be done by teachers adapting the content of the curriculum in such a way that it is manageable for a wider range of learners. This should not be seen as a watering down of the curriculum, but rather as a graded process where learners are taken by a different route to a similar destination. Teachers are aware that children arrive at their classes with different abilities, skills

and knowledge, socio-economic backgrounds and personalities. In order to respond to learners' diverse needs, they need to differentiate teaching methods and strategies. The key to differentiated teaching methods is the flexible use of a wide range of learning materials, methods of presentation, learning activities and lesson organisations (Byers & Rose, 2004:84).

According to Shaddack, Giorcelli & Smith (2007) this means that teachers need to differentiate the manner in which activities are planned and organized in a lesson.
Byers and Rose (2004:79) maintain that differentiation in the inclusive classroom imply that teachers are to offer adaptations to what learners learn (content), how learners learn (process) and how learners demonstrate what they have learned (product).

Respondents from schools A, B and C felt that teachers should identify barriers at the earliest stage and offer such learners support through expanded opportunities. Respondents from the same three schools also mentioned that by being a bit patient when dealing with learners experiencing barriers to learning, teachers would really help these learners to overcome some barriers and make them feel part of the whole.

Teacher 1 from school E added the following as the role of teachers:

"Teachers should be involved by screening learners during the first term by collecting background information of the learner experiencing barriers to learning. Teachers must inform parents about their child's scholastic problems. Once problems are identified, teachers should begin with remedial work and offer learners with barriers expanded opportunities."

Teacher 1 from school D highlighted the importance of collecting the learners' background information by saying:

"The problem is not always academic; sometimes the learner might have missed a step while growing up."

4.4.2.2 Resources

Effective learning is fundamentally influenced by the availability of educational resources to meet the needs of diverse learning styles of all learners. Loosely defined, a resource can be defined as a source or supply from which benefit is produced. The challenge is to make the best use of limited funds.

Respondents from schools A, C and D believed that concrete and tangible teaching aids and sentence making wall charts are needed to help learners who experience barriers to learning. Unfortunately, due to financial constraints, the necessary educational resources such as state-of-the-art textbooks, posters, computer laboratories and regalia are not sufficiently provided. This is especially the case at township schools, farm schools, and schools situated in or near informal settlements.

Teacher 3 from school D said:

"Concrete and teaching aids that learners experiencing barriers to learning can touch, feel and identify with daily as well as sentence-making charts will help learners overcome their barriers to learning."

As far as human resources are concerned, teachers are by virtue of the service they provide to the education system and their membership of the school staff, a knowledgeable and capable human resource at the schools. The term human resources can also be defined as the skills, energies, talents, abilities and knowledge that are used for the production of goods or the rendering of services.

Respondents from schools A, B, C and D felt that teachers generally lacked specialised knowledge when dealing with learning barriers. Almost all of them

expressed the opinion that schools needed the service of a special (remedial) teacher. This view was clearly articulated by teacher 2 from school D who said:

"You see, not all barriers are scholastic and word cards and sentence making cards would not bring much help. The most irreplaceable resource that will make an unprecedented impact is a special teacher, or highly competent personnel and a special class."

4.4.2.3 Support strategies

The Department of Basic Education crafted a policy called *Responding to Diversity through the National Curriculum and Assessment Policy Statement* (DoE, 2011) which is a set of guidelines intended to provide teachers, principals, subject advisors, administrators and other personnel with parameters and strategies on how to respond to learner diversity in the classroom through the curriculum. Curriculum differentiation is seen as a key strategy for responding to the needs of learners with diverse learning styles and needs (See 2.8.2).

Respondents from schools A, B and C knew nothing about support strategies that can be put in practice to help learners experiencing barriers to learning. Two of these schools are public schools in the township and the other is a farm school.

Teacher 2 from school D and teacher 2 from school E admitted that giving learners experiencing barriers extra activities and expanded opportunities, especially in lower grades, work as support strategies.

Teacher 2 from school E said:

"Giving learners expanded opportunities in the community in lower grades help a lot because these learners are still very young. We are able to work on their problems, do the right things and develop on the identified problem areas."

Teacher 1 from school D and teacher 1 from school E postulated that referring learners for specialised therapy is a very effective support strategy that could have a huge impact if, and only if, it is effectively implemented.

Teacher 3 from school D had this to say about referrals:

"Referrals are not helping as there is little the District Based Support Team does to help us."

4.4.2.4 Additional skills

Respondents from schools A, B and C unanimously agreed that teachers need patience and perseverance when dealing with learners experiencing barriers to learning.

Teacher 1 from school C emphasized the issue of teachers being patient by saying:

"Everything about these children is special in its own way. If you are short-tempered you will "kill" these learners. A bit of patience would help."

Interestingly, teacher 1 from school E who happens to be a qualified remedial teacher, stated that:

"Teachers need skills on how to differentiate their teaching methods and adapt the curriculum so as to accommodate varying learning needs of all learners, especially those experiencing barriers to learning."

This response indicates the wealth of knowledge remedial teachers possess compared to that of an ordinary teacher without remedial teaching experience.

4.4.3 Support from District based support team

According to the *Draft guidelines for the implementation of inclusive education* (Department of Education 2002a: 102-105) some of the core functions of the district-based support team are, amongst others, the development and ongoing back-up of support teams in the schools and early childhood learning centres in supporting the capacity building of these institutions, identifying and prioritizing learning needs and barriers to learning in their district, identifying the support needed to address these challenges and pursuing these within a strategic planning and management framework and, finally, ongoing monitoring and evaluation of support. They should also link these institutions with formal and informal support systems so that the needs and barriers can be addressed.

4.4.3.1 Support to School-based support teams

The *White Paper 6* (DoE 2001) states that the primary function of school-based support teams is to put in place properly coordinated learner and educator support services through support to the teaching and learning process by identifying and addressing learner, educator and institutional needs. For school-based support teams to function properly, they need constant monitoring and support from the district based support teams.

Respondents from all schools felt that support from the District Based Support Team is minimal because officials from the education section and therapists take a long time to monitor progress and offer support to both the SBST and referred learners.

Teacher 1 from school C, which is farm school, put emphasis on the fact that there is no support offered by the District Support Team by saying the following:

“No, they take a long time to visit schools and check on progress made. For an example, I know nothing about SIAS and what it means. They do not come to look at

work done to try to accommodate learners who experience barriers, or look at referral files of these learners."

The same view is held by teacher 1 from school D who emphatically stated the following when responding to the question on what kind of support they get from the district based support team:

"None, the lady who is assigned to our school does nothing; we get no help from her."

4.4.3.2 Support to referred learners

Teacher 1 from school C, which is farm school, emphasized the fact that there is no support offered by the District Support Team to referred learners. She had the following to say:

"They do not come to look at work done to try to accommodate learners who experience barriers, or look at referral files of these learners."

The same view was held by teacher 1 from school D who emphatically said the following:

"The only support from the district is to give numbers to referred learners which later give parents a problem as they (parents) have to make large payments for private therapists. Generally, there is no impact that is brought by the district as these learners find themselves in the mainstream due to unavailability of professionals to their parents."

From school B, Teacher 3 said the following on the level of support by the district:

"We get assistance in the form of feedback after screening the child and identifying barriers. We were promised that all referred learners will be awarded clinic numbers for tracing progress but this was never done."

The general feeling was that support offered to referred learners by the District based support team is minimal and had little impact on problems faced by teachers and learners.

4.4.4 Possible improvement to be effected

4.4.4.1 Improvement at District level

Respondents from schools A, B and C advised that in order to improve on the implementation of inclusive education, the relevant District officials should respond quickly whenever called by schools for help. This view that improved support and monitoring would improve implementation of inclusive education in the district, was emphasized by teacher 1 from school D who said:

"First give each school its own District Based Support person who is at the school at least 1 day per week. You give one person too many schools and they cannot do everything.

4.4.4.2 Improvement at school level

Respondents from schools A, B, C and E felt that for inclusive education to be effectively implemented in the Lejweleputswa District, teachers have to be trained extensively on the Screening, Identification, Assessment and Support (SIAS) process. Educators at school or site level are expected to respond to diverse learning needs of all learners with limited skills and knowledge which is not possible.

Existence of limited knowledge is evident by the realization that teachers from schools A, B and C had never seen and subsequently knew nothing about the SIAS (screening, identification, assessment and support) document, which is the Department of Education's 2008 *National Strategy on Screening, Identification, Assessment and Support (SIAS).*

Teacher 2 from school C confessed that they have made no progress whatsoever as teachers do not have suitable knowledge.

Respondents from Schools A and B felt that referring learners for specialised therapy without teachers first exploring all avenues to help these learners, should be avoided. Teachers do not attempt to help learners because they do not know what to do and which intervention strategies to implement.

Respondents from both schools D and E stated that if each school could be awarded the post of a specialised remedial teacher, huge improvements would be visible. Teacher 2 from school E emphasized this view by saying that:

"If possible, the District office should award each primary school with at least one educator who fully understands and has specialised in remedial education to help learners with barriers. All educators should be trained in the Screening, Identification, Assessment and Support process."

The same view was emphasized by teacher 1 of school E who impulsively added:

"Give each school a teacher that can do remedial teaching with the learners, and who can help the teachers to do the correct remedial work."

To highlight the impact the presence of a remedial teacher has in a school, teacher 2 from school E said the following with regard to their school's progress on the practical application of the SIAS process.

"As a school we employed an educator who has a deep knowledge and vast experience in remedial teaching. We have a year programme wherein progress with regard to responding to the needs of learners experiencing barriers, is monitored. Heads of Departments are actively involved in inclusion of learners with barriers and the bulk of work has been distributed to all and in this manner inclusion has been made our business and not that of the school-based support team only."

4.4.5 Other barriers prevalent in schools

The Department of Education (2010a:6) describes barriers to learning as any difficulty within the education system as a whole, the learning site and/or within the learner him/herself which prevent access to learning and development for learners.

Other known barriers besides cognitive ones in school can be categorized as systemic, socio-economic, pedagogic and intrinsic barriers.

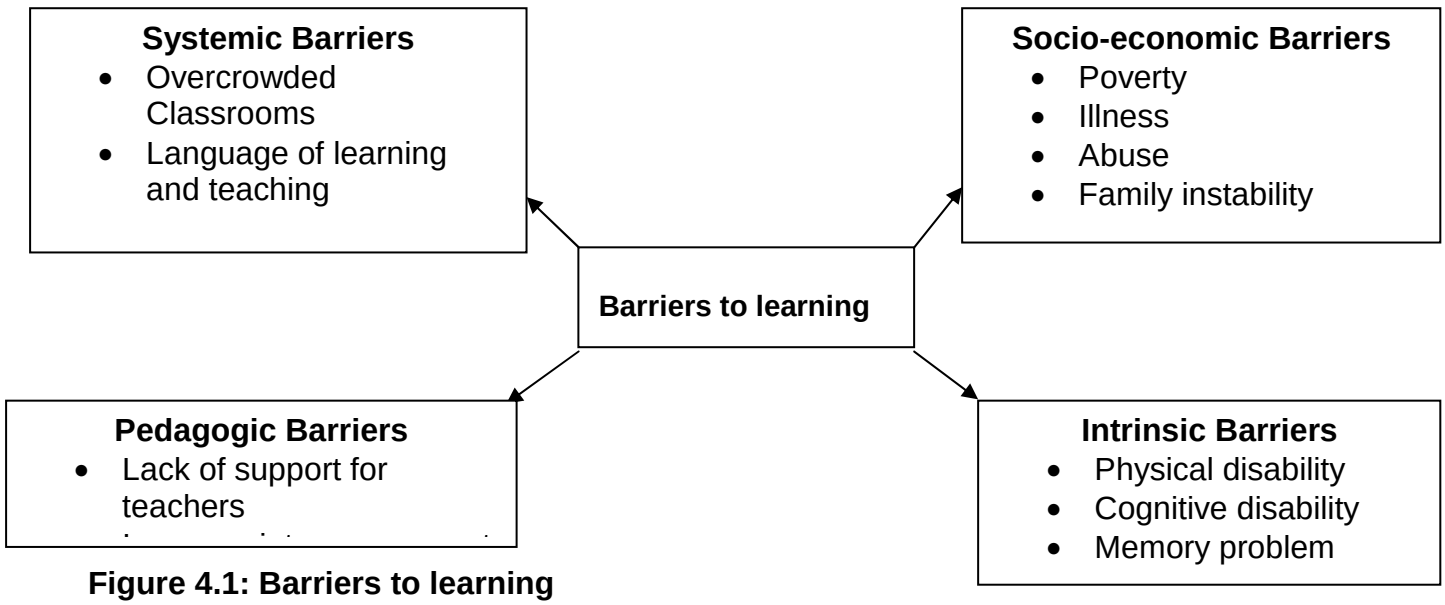

Figure 4.1: Barriers to learning

4.4.5.1 Systemic barriers to education

Systemic barriers to learning refer to barriers that prevail as a result of the education system and which relate or affect the entire education system. Language barriers seem to be the biggest problem in this regard. Teacher 3 from school A summarized the general feeling that learners have a problem grasping and understanding English which is not their mother tongue, but the language of teaching and learning. Many of the participants from schools A, B, C and D agreed.

Teacher 1 from school B supported this view by saying the following:

"Learners have difficulty understanding English especially in grade 4. These learners are taught all their subjects in Sesotho which is their mother tongue in grade 3 and suddenly the next grade they are taught a bulk of subjects in English. This transition is not smooth."

This rough transition in language of teaching and learning complicates teaching and ultimately learners who were doing well in grade 3, begin to perform poorly as a result of this switch.

4.4.5.2 Pedagogic barriers

Pedagogic barriers to learning are barriers brought into the picture by inappropriate teaching methods, unqualified and under-qualified teachers, inappropriate assessment procedures and lack of support for teachers. No contributions with regard to this barrier were forthcoming from participants as most claim not to have no knowledge of support strategies to implement to help learners experiencing barriers to learning.

4.4.5.3 Socio-economic barriers

The socio-economic context within which schools are located greatly affects learning. Socio-economic barriers to education can be defined as barriers that prevail due to a combination of economic and sociological factors. It entails the total measure of a person's work experience and of an individual's or family's economic and social position in relation to others, based on income, education and occupation.

Socio-economic status is often measured as a combination of education, income, and occupation. It is commonly conceptualized as the social standing or class of an individual or group. When viewed through a social class lens, privilege, power and control are emphasized.

According to Morgan, Farkas, Hillemeier and Maczuga (2009) research indicates that children from low socio-economic status households and communities develop academic skills more slowly compared to children from higher socio-economic status groups. Initial academic skills are correlated with the home environment where low literacy environments and chronic stress negatively affect a child's pre-academic skills.

All teachers indicated the enormous problems caused by socio-economic barriers.

Teacher 3 of school A verbalized it as follows:

"Living in squatter camps and informal dwellings that do not have electricity affects the psychological growth as there are no televisions and other media that exposes children to current information and technologies."

a) Poverty

Poverty is the state or condition of having little or no money, goods, or means of support, a condition of being poor. It is the state of one who lacks a certain amount of material possessions or money.

All five schools participating in this study revealed and identified poverty as the main socio-economic barrier in their schools which impacts negatively on learning. Many rural children who attend public schools come from poor homes and cannot afford proper meals or clothes. When they compare themselves to their more affluent counterparts, they become frustrated, shy and develop a low-self-esteem. Being from poor families implies that some learners come to school in the morning without having eaten something and they fail to concentrate on empty stomachs.

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The above-stated fact was supported by teacher 2 of school A, who said:

"Oh….Situation at these learners' homes is heart-breaking. Our learners live in dire poverty and some of them get the last meal for the day here at school through learner nutrition. Hungry learners cannot concentrate in class and would not perform well."

This view was confirmed by teacher 3 of school B who said the following:

"Our society is besieged by the highest poverty these days. Families are really struggling to make ends meet and my experience has revealed that most learners who are absent continually in class are from the most impoverished and struggling families. Such learners are performing poorly in class."

In further support of the impact of poverty on learner performance, teacher 3 of school B added the following:

"Oh my Lord, poverty is causing pain to our young innocent children. At many times once a learner's performance drops, enquiry revealed that a parent of such learner has been fired or retrenched from work and poverty is making in-roads into the household. Poverty made learners to perform very poorly and others leave school prematurely to seek employment and fend for their families."

During winter the situation is worse due to cold weather that necessitates warm clothes and heating equipment at home. Due to a lack of warm clothes and warming equipment like heaters and stoves at home, these learners prefer to be absent from school and they rather stay at home to bask in the sun to keep themselves warm.

This view was also expressed by teacher 1 of school C by saying the following:

"Winter is the worst season wherein poor families struggle a lot to keep themselves warm, get warm food and medication in an event they catch colds. Learners from such families usually do not come to school and as a result thereof they miss a lot of lessons and ultimately, their performance becomes extremely poor."

Learners living in poor conditions are subject to increased emotional stress which adversely affects learning and development. Apart from poverty, which is a barrier to learning, orphanages and children headed households put learners at risk and ultimately the social background becomes a barrier to learning.

b) Being orphaned and child-headed households

Respondents from schools A, D and C identified orphanages and the heading of households by learners as social barriers to learning which are experienced by many learners from the informal settlements. It was explained that, apart from children headed families, there were other cases where parents work and stay at the farms whilst leaving their children to live on their own in the townships.

Teacher 3 of school B said:

"Because parents are dead as a result of prevalent pandemics, most children are orphaned and close relatives become reluctant to take such children into their care. These orphans have to fend for themselves with the eldest becoming the head of the household."

This view was supported by teacher 2 of school C who said:

"Learners without parental care become vulnerable and are not well looked after. Every child needs parental support, guidance and rearing throughout their school life. Without parents, how will these children pay school fees, uniform and transport to go to school? Ultimately these children will end up seeing no use of going to school if such exercise becomes such a frustrating struggle on their side while for others is a simple ride."

c) Illness and HIV/AIDS

Epidemics which arise in any society have a significant impact on learners. With the outbreak and rapid spread of HIV/AIDS many children at school are either infected or affected by this pandemic. Learners who are infected or affected by HIV and AIDS are often those most easily excluded from the education system. They have to stay at home because they are ill or because they have to nurse ill parents or caregivers. If parents or caregivers are excluded from the labour market because of their HIV status, it is likely that financial barriers come into play so that even when they are attending no fees schools, transport costs and the purchase of uniforms and school books become obstacles to attending school.

Respondents from schools A, B and C identified illnesses and the scourge of HIV/AIDS as a direct social barrier to learning that affects some learners adversely. Due to this illness, some learners are orphaned and live with grandparents who are

mostly illiterate. Some children are heading families while others have to leave school to take care of their sick parents and siblings. This view was supported by teacher 2 of school B who said:

"Learners who are infected or affected by HIV and AIDS are often easily excluded from the education system because at times these learners have to stay at home because they are ill or because they have to nurse ill parents or caregivers."

Teacher 3 from school A supported this statement by saying:

"Most learners become traumatised when they have to take care of their beloved family members, parents and siblings. In such circumstances, poverty comes into the family."

Teacher 2 of school C further supported this notion by saying the following*:*

"If parents or caregivers are excluded from the labour market because of their HIV/AIDS related illnesses, it is likely that financial barriers come into play, even though learners may be attending no fee schools, the cost of transport, purchase of uniforms and school books are all obstacles to attending school."

d) Family instability and poor parenting

On the matter of family instability and poor parenting, respondents from schools A, B and C outlined this social issue as one of the social barriers to learning that adversely impacts on learner's performance and mental development. In some instances learners without continued and constant parental supervision through all their developmental stages due to broken families, develop behavioural problems.

These sentiments were also echoed by teacher 3 of school E who exclaimed:

“My goodness! Our learners have a difficulty dealing with developmental stages like puberty and how to handle peer-group pressure that leads to behavioural problems and ill-discipline.”

Interestingly the issue of family instability and poor parenting is only rife in townships and rural schools while private and former Model C schools do not seem to experience noticeable problems regarding poor parenting and family instability impacting on learner’s performance. For the most part this could be attributed to the fact that most parents who enrol their children at private and former model C school are professionals and people with good social standing in their respective communities.

4.4.5.4 Intrinsic barriers

Van der Elst (2008:4) defines intrinsic barriers to learning as barriers located within the individual child, for example barriers experienced by learners with neurological, physical, sensory and cognitive disabilities or psychosocial and emotional difficulties.

Teacher 1 from school stated that:

“The problem is not always academic. Somewhere in his/her development, a learner might have missed a step while growing up. For an example, if a learner did not crawl as a baby, he will have problems with reading and maths.”

b) Ill- discipline and peer pressure

All schools, that is, respondents from schools A, B, C, D and E reported bad behaviour or ill-discipline and language other than mother tongue as barriers to learning in some learners. In addition, respondents from schools D and E highlighted the effect of peer pressure on behaviour.

Teacher 1 from school E, who is a qualified remedial teacher, outlined the pressure that learners experiencing barriers to learning have to endure by exclaiming emotionally:

"Why do you want learners with serious problems in the mainstream? They are different and other learners know that. They are not capable to do the work. Other learners label them as incompetent and push them aside. They don't want them in their groups because the group will not succeed."

4.5 DISCUSSIONS FROM QUESTIONNAIRES

The policies of the Department of Education expect of school principals to be champions of curriculum delivery and instruction. Loeb and Horng (2010) define instructional leadership as those actions that a principal takes, or delegates to others, to promote growth in student learning. In practice, this means that the principal encourages educational achievement by making instructional quality the top priority of the school which will bring that vision to fruition. Cotton (2003) adds that effective instructional leaders are intensely involved in curricular and instructional issues that directly affect student achievement, and as such a school principal 'sits' on curriculum mastery and delivery of the highest quality using available resources and tools to achieve that.

It is because of this expectation that the researcher deemed it necessary to get the principal's perspective on inclusive education in their schools by using a questionnaire to collect data from them.

The biographical data characteristics of the participants (selected school principals) together with relevant logistics on the socio-economic standing of most learners in the school are outlined first. The researcher found it relevant to tabulate biographical information about the five principals who were participants in this study. It should be noted also that this tabulation will not, in any way, compromise the assurance of

confidentiality and anonymity guaranteed to the participants during the interview process. This information is necessary in order to understand the background and work situation of the participants in relation to their responses. Such detailed information is portrayed in Table 4.3.

Table 4.3: Principal data

PRINCIPALS	SCHOOL A	SCHOOL B	SCHOOL C	SCHOOL D	SCHOOL E
Age	51-60	41-50	51-60	41-50	51-60
Gender	Male	Male	Female	Male	Male
Professional qualifications	Master's degree	Master's degree	Honour's degree	Bachelor's degree	Bachelor's degree
School classification/category	Township	Township	Rural	Private	Ex Model C
Learners' economic status	Average	Poor	Poor	Average	Mixed
Learner enrolment	500-1000	500-1000	0-100	200-500	500-1000
Number of staff	16-30	16-30	1-8	16-30	16-30

Themes from questionnaire

From the readings, the researcher identified 'units of information' that served as the basis for defining or representing categories. The development of these themes and categories was guided by aims and objectives of the study.

The main themes identified in the questionnaires were as follows:

- Understanding of inclusive education
- Educator competence and monitoring
- Most often encountered barriers at school
- Possible improvements

Table 4.4 clearly outlines the main themes and categories which guided the analysis and findings of the questionnaires completed by principals.

TABLE 4.4 MAIN THEMES AND CATEGORIES FROM QUESTIONNARE

Theme 1	**Understanding of inclusive education**
Theme 2	**Educator competence and monitoring**
Category 1	Competence and knowledge
Category 2	Control mechanisms
Theme 3	**Most often encountered barriers at school.**
Category 1	Systemic barriers
Category 2	Pedagogic barriers
Category 3	Socio-economic barriers
Theme 4	**Possible improvements**
Category 1	Improvement at school level
Category 2	Improvement at district level

Table 4.3 above shows four highlighted main themes with each theme consisting of various categories. These themes and categories will now be discussed in detail to present the major findings of the study based on responses of individual principals in the questionnaire. In addition, applicable verbatim quotes obtained from the raw data will be used to confirm and justify important findings.

4.5.1 Inclusive Education

According to Mittler (2000) inclusive education can be defined as a system of education that is responsive to the diverse needs of learners with particular focus on developing an inclusive community and education system which is based on a value system that invites and celebrates diversity arising from gender, nationality, race, language, socio-economic background, cultural origin and level of education achievement of disability.

According to UNESCO (2005:13-14) inclusion is seen as a process of addressing and responding to the diversity of needs of all learners through increased participation in learning, cultures and communities, as well as reducing exclusion within and from education. It involves changes and modifications in content, approaches, structures and strategies, has a common vision which covers all children of the appropriate age range and a conviction that it is the responsibility of the regular system to educate all children.

Principals, as 'champions' of the curriculum, are expected, through quality curriculum delivery, to ensure that all learners in the school benefit from the delivery, irrespective of whether they experience barriers to learning or not. The above view is further consolidated by the Lejweleputswa Education District strategic intent which is: "striving for excellence and equality by raising the bar, closing the gap and leaving no learner behind". It therefore becomes the direct responsibility of principals to ensure that teaching taking place in classes is inclusive and responsive to the diverse learning needs of all learners in the school.

The principals of Schools B and C understood inclusive education as education intended to cater for, recognize and respect the differences among all learners and respond to challenges experienced by learners as barriers to learning. The principals of schools A, D and E understood inclusive education as a part-discipline of education that assists learners at school with severe or partial physical, emotional, behavioural and psychological barriers to learning.

4.5.2 Educator competence and monitoring

4.5.2.1 Competence and knowledge

The principals of school A and school B felt that some teachers in their schools are ignorant as to how to respond to the learning needs of learners experiencing barriers

to learning. The two principals admitted that their schools are not ready to deal with the process of inclusion of learners with learning barriers.

The principal of school B stated:

"Our school is not ready to deal effectively with problems encountered by learners experiencing barriers because most educators are not fully equipped to assist or deal with problems experienced by these learners"

This view is also supported by the principal of school C which is a rural school:

"These educators are not equipped at all to address barriers experienced by a host of learners in the school. Teachers understand their role as only filling referral forms and submit them to the District Office for such learners to get help from the child guidance clinic and the inclusive sections."

On the other hand, the principal of school E, which is a former model C school, conveyed that members of staff are up to the challenge of including learners experiencing barriers to the learning process:

"The educators at my school have enormous capacity of implementation inclusive education. We encourage learners to take responsibility for their learning. Learners are motivated to establish and sustain positive, caring relationships with other learners. We discourage the dumb-docon activities."

He added that their strength to respond to the diverse learning needs of all learners, including those experiencing barriers to learning, lies with the special education teacher that the school has and the confidence that her presence installs in other members of the staff.

He said:

“A remedial or special educator in any school would be the champion of the plight of learners experiencing barriers to learning. Such a teacher highlights to the entire teaching personnel issues and frustration endured by such learners as well as intervention strategies to help to accommodate varying learning abilities of learners with barriers.”

The principal of school D, which is a private school, stated that the majority of educators at that school are not fully competent to accommodate learners with barriers. This was attributed to the involvement of qualified therapists and referral of leaners experiencing barriers to them. This implies that teachers do not deal that much with learners experiencing barriers to learning because therapists are engaged to help such leaners. This level of competence is spearheaded by the active involvement of the principal through leading the curriculum delivery process so that it responds to the diverse learning needs of learners experiencing barriers.

The principal of school E said:

“I encourage lessons which use peer learning activities, which contains mixed-ability activities, which accommodate the broad range of learning styles. The lessons should build upon every learner’s strengths and foster every learner’s success.”

4.5.2.2 Control Mechanisms

For the purpose of quality assurance, instruments should be developed and implemented to control and monitor quality curriculum delivery which accommodate learners experiencing barriers. As a champion of curriculum mastery and delivery, the principal should have instruments and yardsticks since he/she has to measure the level at which inclusive education is implemented in their schools. Noteworthy is that the responses of the principals of school A and B were not related in any way to

the question of how they ensure that lessons prepared and presented in classes accommodate learners experiencing barriers to learning. They mentioned issues like the SBST, the briefing of other teachers and themselves as principals, and also the motivation of teachers to remember and accommodate learners with barriers. On the other hand, the principal of school E pointed out that he controls teacher lessons and ensures that learners are presented with content which progresses from simple to more complex.

This view of principals controlling and monitoring educators' lessons and planning and presentation was supported by the principal of school D who stated that:

"I control teachers' lesson plans to ensure that provision is made for extended opportunities for learners experiencing barriers to learning. I encourage teachers to always ensure that their lessons accommodate all learners with their varying learning abilities.

4.5.3 Most often encountered barriers

Barriers to learning are difficulties that arise within the education system as a whole, the learning site and within the learner which prevent access to learning for some learners. Other known barriers, besides cognitive ones, can be categorized as systemic, socio-economic, pedagogic and intrinsic barriers. (See figure 4.1)

4.5.3.1 Systemic barriers

Systemic barriers to learning refer to barriers that prevail as a result of the education system, and which relate to or affect the entire education system. The principal from school C pointed out that learning space can present a barrier to learning as well as the school's physical environment, especially for learners with physical disabilities.

Apart from all known and cited barriers, the principal at school D added language of teaching and learning which is not a child's home language, as a barrier to both teaching and learning:

"Being taught in a language that is not a child's home language poses a problem at learners being able to read and listen with comprehension, thus producing low-quality responses to questions."

This view was also shared by the principal of school A who came up with the concept of teachers' "code-switching" during their lesson presentation. He explained code switching as an act whereby teachers who are supposed to present a lesson in English, switch to the home language of the teacher and learners. For example, mathematical concepts and rules may be explained in the learners' mother tongue which is not the language of teaching and learning (LOLT), while English is used for writing tests or examinations.

Put in his own words:

"In most township public schools, teachers teach and explain in Sesotho and assess learners in English."

This practice outlines a mismatch and non-existence of coordination between teaching and assessment: assessment is intended to reflect on the effectiveness of teaching and should indicate the extent to which learning took place.

4.5.3.2 Pedagogic barriers

Pedagogic barriers to learning are barriers brought into the picture by inappropriate teaching methods, unqualified and under-qualified teachers, inappropriate assessment procedures, lack of support for teachers and an inflexible curriculum. At times the curriculum can be very inflexible in nature and not be able to meet the

diverse needs of all learners if educators do not accommodate all learners' learning styles. Key components of the curriculum include the style and tempo of teaching and learning.

The principal of school A said:

"There are specific topics and number of assessment activities that teachers have to cover per term while on the other hand the policy states that learners should be allowed to work at their own pace so that no one will feel left out."

The principal of school B added that:

"Sometimes educators, as a result of inadequate training, use teaching styles which do not meet the needs of some especially those experiencing barriers to learning. At times an educator teaches at a pace which accommodates learners who grasps quickly, thus ignoring and excluding others."

Another type of barriers arising from the curriculum are those which result from the medium of teaching and learning. To many learners teaching and learning takes place through a language which is not their home language and this leads to linguistic difficulties.

The principal of school B added the following:

"In most township public schools, teachers teach and explain concepts to learners in Sesotho, which is their mother tongue. The very same teacher assesses those learners on the same concepts in English and as a result thereof these mismatches between teaching and assessment create a problem, thus becoming a barrier to both teaching and learning."

This view was further supported by the principal of school E who said the following:

"Code-switching, which is teaching learners in home language and assessing the very same content on English which is a language of teaching and learning, outlines a mismatch and non-existence of collaboration between teaching and assessment. Assessment is intended to reflect on the effectiveness of teaching and indicate the extent to which learning took place."

4.5.3.3 Socio-economic barriers

Societal barriers differ from community to community, and the socio-economic context within which schools are located greatly affects learning.

High on the list of socio-economic barriers that affect teaching and learning adversely was the impact of HIV/AIDS on learners, through either being infected or affected.

The principals of all the schools cited and also acknowledged that conditions like HIV/AIDS manifest itself as a barrier to learning because learners are frequently absent due to being ill or having to care for their ailing parents or siblings.

Children whose parents are living with HIV/AIDS often experience many negative changes in their lives and they may consequently suffer neglect, including emotional neglect, even long before they are orphaned. Eventually they may suffer the death of their parent(s) and the accompanying emotional trauma. Under these circumstances they have to adjust to a new situation, with little or no support, and may suffer exploitation and abuse.

The principal of school D commented as follows:

"Children orphaned by AIDS may miss out on school enrolment, have their schooling interrupted or perform poorly in school as a result of their situation."

Principals also mentioned expenses such as school fees and school uniforms which present barriers to school attendance if orphans' caregivers struggle to afford these costs. Schools should play a crucial role in improving the prospects of AIDS orphans and securing their future. A good school education can give children a higher self-esteem, better job prospects and economic independence. Apart from lifting children out of poverty, such an education can also give children a better understanding of HIV and AIDS and decrease the risk of becoming infected themselves. Schools can also offer benefits to AIDS orphans outside of education, such as emotional support and care.

The principal of school A added:

"Emotional and sexual abuse as well as poor parenting are social factors that projects themselves as barriers to learning in schools and these factors affects learner performance adversely."

One point worth noting is that none of the five principals who completed questionnaires identified poverty as a possible barrier to learning that affects multitudes of learners in public schools.

4.5.4 Possible improvements

Improvement, in the context of inclusive education, and inclusion is an act of making profitable use of inclusive education to accommodate the varying learning needs of all learners, including those experiencing barriers to learning. To inform the future direction and development of inclusive education policy and practice in the Lejweleputswa education district, it is important that current practices related to school and district levels be monitored and evaluated.

4.5.4.1 School level

The principals of school A, C, D and E mentioned that regular workshops can be of great help to educators to enable them to identify each form of barrier as well as possible intervention strategies to remedy the situation.

The principal of school A further suggested the following:

"Teachers in early childhood development (ECD) classes should be trained thoroughly so that they are the first people to identify developmental delays or health needs in a child, and apply intervention strategies."

The principal of school B acknowledged training done for teachers who are members of the school-based support team, but further suggested that training should include all teachers across all phases, even those who do not serve in the school-based support team. In the same vein, the principal of school A suggested that research be conducted in order to help learners experiencing barriers to learning.

Parental involvement was cited by school B's principal as a basic necessity in trying to respond to the learning needs of learners with barriers.

The principals of schools A, B, C and D felt that the support offered by the district based support team is minimal, very poor and of low quality. The principal of school D bluntly stated:

"There is no meaningful support from the District at this moment."

This view was supported by the principal of school A, who expressed his view like this:

"Support is minimal. In some cases the quality of support given is of poor standards. Visit to school is sporadic and workshops presented are also of poor quality due to time frames which are presented."

Both principals of schools B and C advised that improved visits, assistance and monitoring from departmental officials from the inclusive education section will bring the desired change and improvement. The presence of a specialised teacher in special needs education or remedial education is seen as a pivotal activity that would help schools improve with regard to addressing diverse learning needs of all learners in the school, including those experiencing barriers to learning.

School C's principal added that the supply of relevant and suitably adapted teaching and learning resources by the department is one solution to schools' poor response to the inclusion of learners with learning barriers in learning activities. In the same vein, the principals of both schools D and E felt that the most irreplaceable resource in any school is its human resources. According to them schools need at least one qualified special education or remedial teaching educator who could assist learners with learning or cognitive barriers.

The principal at school A supported this view and added that schools need the SIAS (Screening, Identification, Assessment and Support) tool-kit with clear guidelines.

4.5.4.2 District level

At the district level it is expected that a District based support team has to be established with the function of managing the implantation of inclusive education.

With *White Paper 6* (DoE, 2001) the Department of Education commits itself to strengthen education support services through the establishment of district-based support teams to provide a coordinated, professional support service that draws on expertise in further and higher education and local communities, whilst targeting

special schools and specialised settings, designated full-services and other primary schools and educational institutions (See 2.6.3.3).

The principals of schools A, B and C felt that in order for the Lejweleputswa district to improve its performance on the implementation and monitoring of inclusive education, the district should employ enough special education officials and therapists to monitor and help schools with the implementation. The principal of school E emphasized this point by saying:

"Improvement on implementation can be effected if a lot of posts are created for subject advisors with knowledge and experience and each is assigned to fewer schools to help and monitor implementation."

This need for increased support personnel is supported by the principals of both schools C and D who added that visits to schools by district officials would then be regular because each official would be assigned to fewer schools to help with implementation, support and monitoring. These officials would then be able to train educators effectively across all phases so that they are able to identify barriers to learning individually. The principals of both schools A and D were of the view that district officials dealing with inclusive education and support teaching needed to be capacitated more.

The principal of school A stated that:

"There are more problems that our district officials are unable to handle in our schools. This is explained by the long time officials take to respond and give feedback once a situation of a case had been referred to them. District personnel dealing with support teaching and inclusive education should be capacitated to handle school problems."

This view was supported by the principal of school D, who stated that:

"District officials in the special needs education section need to be capacitated intensively so that they become a team that is solely devoted, knowledgeable and capable to assist schools to become fully inclusive."

One of the key aspects which was identified to bring about improvement in the effective implementation of inclusive education in the Lejweleputswa district, is the provision of suitable resources to schools by the District officials.

This view was supported by the principal of school E who said that:

"We need the District Office to supply us with suitable teaching aids especially designed for learners with special support needs."

4.6 CONCLUDING REMARKS

This chapter entailed the analysis and interpretation of the research findings after in-depth interviews were conducted at five selected primary schools and a questionnaire completed by principals of the same schools with regard to the implementation of inclusive education. This analysis was preceded by the identification of the main themes and categories. The chapter presented the analysis and interpretation of biographical and interview data as well as the data from questionnaires. A brief profile of the participants was firstly presented. The data interpretation focused on the understanding of inclusive education as well as the extent and level of implementation of inclusive education in the Lejweleputswa district. The four categories of barriers to learning commonly experienced by most learners at school were then discussed in detail.

To the researcher, the conducting of the interviews was a very satisfying experience. Empathy was displayed by each of the participants as they described some of the emotionally touching cases of some of their learners. The refusal of some learners to

welcome learners experiencing barriers to learning in their groups during group-work and labelling them as incompetent, was cited as an example.

Chapter five concludes the research with an overview of this investigation, a synthesis of the significant findings and recommendations for further research.

CHAPTER 5

SUMMARY OF FINDINGS AND RECOMMENDATIONS

5.1 INTRODUCTION

The problem investigated in this study was the implementation of inclusive education in primary schools of the Lejweleputswa education district. This study sought to achieve the following specific objectives as stated in section 1.6:

- to determine the background and nature of inclusive education worldwide and in South Africa;
- to verify which policy guideline developments took place since the *Education White Paper 6 (2001)* was published;
- to determine the extent to which inclusive education has been implemented in public primary schools in the Lejweleputswa District;
- to establish which problems are experienced by primary schools regarding the implementation of the policy; and
- to come up with recommendations based on the research done for a more sufficient implementation of inclusive education in primary schools in the Lejweleputswa district.

The aims of the research were to undertake a study of the relevant literature to establish the background to and nature of inclusive education worldwide and in South Africa, highlight problems that are experienced by primary schools regarding the implementation of the inclusive education policy, and provide recommendations with regard to the successful implementation of the inclusive education policy.

This chapter highlights and summarises the major findings of this research as well as meaningful issues which came to light from the literature review and the empirical evidence. Recommendations are made for the implementation of inclusive education

in public primary schools in the Lejweleputswa District and for further study. The chapter highlights limitations of the study and also presents themes for further research.

5.2 SUMMARY OF LITERATURE STUDY

Chapter one outlined the background to the problem and presented a brief preliminary survey of relevant literature. An in-depth literature study was conducted in chapter two to obtain the historical background to inclusive education, to determine the interpretation of inclusive education internationally and to get an overview of inclusive practices in a few selected countries. Chapter two also dealt with inclusive education in the South African context, the medical model of special needs and the Bronfenbenner theory of ecological systems.

Chapter two further touched on South Africa's post-apartheid educational transformation and policy development as well as learning support structures as outlined by the Department of Education. Also covered in chapter two were challenges to inclusive education in South Africa, strategies for responding to learner diversity through the curriculum as well as ways of fostering and promoting parental recognition and involvement.

5.3 SUMMARY OF THE EMPIRICAL INVESTIGATION

Information from the literature study in chapter two provided a theoretical framework for the direction of the empirical investigation, discussed in chapters four and five, which was conducted to determine the implementation of inclusive education in public primary schools in the Lejweleputswa District. This investigation was conducted within the qualitative paradigm and from a phenomenological perspective which involved an interpretive and constructivist approach (section 3.3). The data was collected by means of social interaction (focus group interviews) between the researcher and the participants (school-based support teams) in the school setting

(section 3.7.3.3). In addition, open-ended questionnaires which had to be completed by the principals of the same five selected schools, were distributed (section 3.7.3.5).

Various ethical measures such as informed consent, voluntary participation, permission to tape-record interviews, anonymity and confidentiality were considered to ensure that the participants' rights were protected and not violated in any way (section 3.4.). Accordingly, the interviews were tape-recorded and transcribed verbatim (section 3.8.1). The data was then analysed and the four criteria of truth, i.e. value, applicability, consistency and neutrality were employed to ensure the trustworthiness of the empirical findings (section 3.8.2).

The interview transcripts were then analysed and emerging themes and categories were identified and developed and the same was done to the questionnaires completed by the principals (section 4.3). This process assisted the researcher with content analysis and interpretation. The main themes identified in the empirical investigation were as follows:

- Effectiveness of school-based support teams
- Educators' role and resourcefulness
- Level of support from District-based support team
- Possible improvements in the implementation of inclusive education in the Lejweleputswa district
- Other known barriers to learning prevalent in schools

After consideration of the research results of each theme and category, certain conclusions were reached (see section 5.6).

5.4 CONCLUSIONS FROM THE LITERATURE STUDY

5.4.1 Historical background of inclusive education

From the preceding literature study it was confirmed that historically children with disabilities have been treated as “in-valid” or inferior, in need of very special protection and thus as unable to benefit from education. Later on came a view that learners with disabilities should be educated together with their peers in regular education settings. The idea of inclusive education was driven by various international declarations and given more impetus by two conferences set up under the auspices of the United Nations.

UNESCO (2005:13-14) defines inclusion as a process of addressing and responding to the diversity of needs of all learners through increasing participation in learning, cultures and communities, and reducing exclusion within and from education. It involves changes and modifications in content, approaches, structures and strategies, with a common vision which covers all children of the appropriate age range and a conviction that it is the responsibility of the regular system to educate all children.

5.4.2 Inclusive education in a South African context

5.4.2.1 Medical model

South Africa used a medical approach that utilised the patient-diagnosis-treatment sequence and paradigm which located the source of the deficits within the individual. The enactment of this view of diversity within the South African education system had the effect of legitimising exclusionary practices, affirming the status and power of professionals and creating the belief amongst teachers that teaching children with disabilities is beyond their area of expertise.

5.4.2.2 Bronfenbrenner's ecological systems theory

With the departure from the medical model to a more inclusive approach to inclusive and special needs education, the focus was placed on ecological and systems theories to provide a broader understanding of the learner with special needs. One of the well-known scholars in the field of developmental psychology, Urie Bronfenbrenner, developed the ecological systems theory that looked at a child's development within the context of the system of relationships that form his/her environment. The eco-systemic perspective moved away from focusing on the individual intrinsic problem(s) of a leaner to a broader assessment of all systems impacting on barriers to learners and development. This theory defines four types of environmental systems which contain roles, norms and rules that powerfully shape psychological development.

5.4.2.3 Post-apartheid educational transformation and policy development

The *White Paper 6* stated that the function of the National Department of Education is to formulate policy which is done in collaboration with all the stakeholders who are involved in education, and furthermore that teachers are a key element in the successful implementation of inclusive policies.

The literature study conducted in section 2.4.4 confirmed that the Department of Education crafted and developed very comprehensive policies and guidelines to ensure that the learning needs of learners experiencing barriers are catered for in the education system. Such guidelines include the following:

5.4.2.3.1 The report on Implementing Inclusive Education in SA (2008)

In 2004 the Department of Education issued a tender for field-testing the implementation of *Education White paper 6 (2001)*. The field test found that special schools need to focus on specific disabilities, and not a wide range thereof, so that

the support they offer is specialised, and furthermore that the fear as well as negative attitudes towards disability amongst the broad public still need to be addressed. The test highlights the main challenge as being the glaring disparities in the resourcing of special school across provinces and the lack of support by district officials.

5.4.2.3.2 The National Strategy on Screening, Identification, Assessment and Support (SIAS: 2008)

The Screening, Identification, Assessment and Support (SIAS) Strategy (DoE, 2008) was introduced in order to overhaul the process of identifying, assessing and providing programmes for all learners requiring additional support, and moreover to enhance participation and inclusion. These guidelines expect teachers to collect background information of the learner and also to identify the support needs of a learner that is experiencing barriers to learning.

5.4.2.3.3 Guidelines for Full-Service/Inclusive Schools (2010)

This is a set of guidelines on how to ensure that ordinary schools have an inclusive orientation and it sets criteria for schools, districts and provinces against which to measure their progress towards inclusion. It also provides criteria and minimum standards that a school/institution must comply with to be considered an inclusive/full-service school/institution.

5.4.2.3.4 Guidelines for Inclusive teaching and learning (2010)

These guidelines provide additional information to educators on conditions, illnesses, disabilities as well as the deprivations that affect children's ability to learn effectively. These guidelines outline characteristics, the barriers they present and strategies for effective teaching.

5.4.2.3.5 Responding to Diversity through the National Curriculum and Assessment Policy Statement (2011)

Responding to Diversity through the National Curriculum and Assessment Policy Statement (DoE, 2011) is a set of guidelines which is intended to provide teachers, principals, subject advisors, administrators and other personnel with parameters and strategies on how to respond to learner diversity in the classroom through the curriculum.

5.4.2.4 Learning support structures as outlined by *White Paper 6* and subsequent policies

The Education White Paper 6, (2001) makes provision for support by means of a systems approach and collaboration between these systems.

- Nationally, the National Department of Education is to formulate policy in collaboration with all the stakeholders who are involved in education. Some of these policy initiatives are briefly discussed in section 2.4.4 of the literature study.

- The nine provincial departments are to implement policy accepted by the National Department of Education by ensuring that budgets make provision for inclusive education, and that schools are accessible and have the necessary individual devices and equipment to support learners with disability.

- District support teams are to be established so that they provide a coordinated professional support service which fosters the development of effective teaching and learning, primarily through identifying and addressing barriers to learning at all levels of the system. They should also be engaged in the

development and ongoing support of local institutional-level support teams in schools, colleges, early childhood and adult learning centres.

- Institution/School-based Support teams' primary function is to put in place properly coordinated learner and educator support services through support to the teaching and learning process by identifying and addressing learner, educator and institutional needs.

5.4.2.5 Inclusive classrooms

As more learners with disabilities, including those who have experienced some form of learning breakdown, are accommodated in ordinary classrooms, teaching is likely to become more demanding for a number of reasons, as discussed below.
All barriers in the *physical environment* should be removed to make the classroom accessible to learners with physical disabilities. In the inclusive classroom the concept of curriculum differentiation is of considerable importance. Barriers to learning arise from the different aspects of the curriculum such as the content, the language, classroom organisation, teaching methodologies, pace of teaching, time available to complete the curriculum, teaching and learning support materials and assessment. According to Mitchell (2008:102) curriculum differentiation is a key strategy for responding to the needs of learners with diverse learning styles and needs. It also takes into account learners' ability levels, interests and backgrounds.

Because the National Curriculum Statement (NCS) is learner centred, it implies that every learner's strengths and needs will be known and accommodated in an inclusive classroom so that, in due time, each learner will achieve the designated objectives at individual levels.

5.4.2.6 Challenges to inclusive education

According to Engelbrecht & Green (2007:13) findings from research and evaluation studies have highlighted several challenges to inclusive education in South Africa. A few of these challenges are briefly discussed below.

5.4.2.6.1 Parent involvement

The role of parents as partners in their children's learning and school life need to be supported and upheld. Parents have a key role in screening, identification, assessment and support of their children for effective decision-making regarding the nature and extent of the support their children require. When parents take an active interest in their children's teaching, learning and assessment, inclusion is enhanced. In the case of certain disabilities and illnesses, it is imperative that the parents consult community-based clinics and/or other professional practitioners (including teachers) in order to conduct an initial assessment and to plan a suitable course of action for the learner.

5.4.2.6.2 Teacher attitude

An attitude is usually defined as a tendency to react positively or negatively towards a certain object, be it a person, idea or situation (Engelbrecht & Green, 2007: 142). Attitudes towards inclusive education and commitment to Education for All constitute a critical challenge in terms of the impetus to inclusive education. Avramidis and Norwich (2002:130) explain that teachers are a key element in the successful implementation of inclusive policies and their perceptions of inclusive policies will not only determine their acceptance of those inclusive policies, but it will also affect their commitment to implementing such policies.

5.5 CONCLUSIONS FROM THE EMPIRICAL INVESTIGATION

The five main themes that surfaced in the empirical investigation were the effectiveness of school-based support teams, the educators' role and resourcefulness, the level of support from district-based support teams and possible improvements to the implementation of inclusive education and to other known barriers to learning prevalent in schools (section4.3).

5.5.1 Effectiveness of School-based Support teams

The data from the interviews with school-based support team members indicated that the most effective teams are those that have one or two qualified remedial teachers with vast experience and knowledge of special and remedial education. In private schools the School-based Support Team involves parents from the onset and engages private therapists to help learners for a minimal fee that is paid by the affected learners' parents.

As for public schools in the township, school-based support teams are generally not effective as they lack knowledge of policies and guidelines for inclusion. Another factor is that they do not get support from fellow teachers who are supposed to take the responsibility for identifying learners with problems in his/her subject and collectively designing a support package for such learners. Support from both parents and the district officials is minimal which causes school-based support teams to be ineffective with regard to the performance of their duties.

5.5.2 Educators' role and resourcefulness

The teachers' role in an inclusive classroom is the identification of learner strengths concurrently with the provision of assistance in overcoming particular weaknesses by differentiation of the curriculum as well as the methods used to deliver it. Differentiation of the curriculum requires mixed-ability teaching that involves a diverse range of teaching strategies so as to accommodate the diverse learning

styles of all learners in a class. Curriculum differentiation is seen as a key strategy for responding to the needs of learners with diverse learning styles and needs (see 2.8.2). Data from respondents from farm and township schools revealed that teachers knew little or nothing about support strategies that can be put to practice in order to help learners experiencing barriers to learning.

The interview transcripts indicated that teachers generally lack specialised knowledge when dealing with learning barriers. Almost all of them expressed the opinion that the most irreplaceable resource that will make an unprecedented impact is a special teacher, or highly competent personnel and a special class.

Effective learning is fundamentally influenced by the availability of educational resources to meet the needs of diverse learning styles of all learners. Unfortunately, due to financial constraints, the necessary educational resources such as state-of-the-art textbooks, posters, computer laboratories and regalia are not sufficiently provided. This is especially the case at township schools, farm schools, and schools situated in or near informal settlements.

5.5.3 Level of support from District based support team

The *Draft guidelines for the implementation of inclusive education* (DoE 2002) state that one of the core functions of the district-based support team is, amongst others, the development and continued back-up of school-based support teams in order to support the capacity building of these institutions, to identify and prioritise learning needs and barriers to learning in their district, to identify the support needed to address these challenges, and moreover, to pursue these within a strategic planning and management framework and ongoing monitoring and evaluation of support.

Interview transcripts suggested that support from the District Based Support Team is minimal because officials from the inclusive education section and therapists take a

long time to monitor progress and offer support to both the SBST and referred learners.

5.5.4 Possible improvements in the implementation of inclusive education in the Lejweleputswa district

Data from both interviews and questionnaires suggested that improved support and monitoring would improve implementation of inclusive education in the district. One other suggestion for possible improvement was that each District Based Support person be awarded a handful of schools to support and monitor. Interview transcripts exposed the view that in order for inclusive education to be effectively implemented in the Lejweleputswa District, teachers have to be trained extensively on the Screening, Identification, Assessment and Support (SIAS) process. Educators at school or site level are expected to respond to the diverse learning needs of all learners, but with limited skills and knowledge that will not be possible.

The other suggestion was that each school be awarded a teacher that can do remedial teaching with the learners, help the teachers to do the correct remedial work and monitor progress with regard to responding to the needs of learners experiencing barriers.

5.5.5 Other known barriers to learning prevalent in schools

The Department of Education (2010:6) describes barriers to learning as any difficulty within the education system as a whole, the learning site and/or within the learner him/herself which prevent access to learning and development of learners. Data from the interviews confirmed that barriers to learning in schools can be categorized as systemic, socio-economic, pedagogic and intrinsic barriers.

5.5.5.1 Systemic barriers to education

Systemic barriers to learning refer to barriers that prevail as a result of the education system and which relate to, or affect the entire education system. Data from both interviews and questionnaires indicated that participants felt that language is the biggest problem in this regard because learners have a problem grasping and understanding English which is not their mother tongue, but the language of teaching and learning. Another aspect is that the language of learning and teaching for grade 3 learners in township public schools is Sesotho, and in the next grade it is English. Interview transcripts indicated that this rough transition in language of teaching and learning makes teaching difficult and ultimately learners who were doing well in grade 3, begin to perform poorly in grade 4 as a result of this switch.

5.5.5.2 Pedagogic barriers

Pedagogic barriers to learning are barriers brought into the picture by inappropriate teaching methods, unqualified and under-qualified teachers, inappropriate assessment procedures and a lack of support for teachers. Data from the questionnaires indicated that teachers explain concepts to learners in their home language and then conduct assessment in the official LOLT, which is English. This mismatch in language manifests as a barrier to learning.

5.5.5.3 Socio-economic barriers

The socio-economic context within which schools are located greatly affects learning. Socio-economic barriers to education can be defined as barriers that prevail due to a combination of economic and sociological factors. It entails a total measure of a person's work experience and of an individual's or family's economic and social position in relation to others, based on income, education and occupation.

Data from both interviews and questionnaires confirmed that learners are faced with a host of socio-economic barriers to learning such as poverty, being orphaned and subsequent child-headed households, illnesses like HIV/AIDS, as well as family instability and poor parenting. Poverty as a dominant socio-economic barrier was identified only by teachers during interviews.

5.5.5.4 Intrinsic barriers

Van der Elst (2008:4) defines intrinsic barriers to learning as barriers located within the individual child, for example barriers experienced by learners with neurological, physical, sensory and cognitive disabilities or psychosocial and emotional difficulties.

Data from both interviews and questionnaires confirmed that learners' learning problems are not always societal, but rather influenced by the child's mental development. Other barriers are bad behaviour or ill-discipline and peer group pressure.

5.6 RECOMMENDATIONS

Based on the research findings and conclusions derived from the views of the participants in the study, the following recommendations are made to effectively implement inclusive education in primary schools in the Lejweleputswa education district.

5.6.1 Role of Department of Education

The Department of Education at national level has a pivotal role to play in giving direction to schools, educators and all role-players in terms of policy formulation and provision of guidelines on the implementation of inclusive education in schools. The literature study has confirmed that after the *White paper 6: Special Needs Education: Building an Inclusive Education and Training system* (DoE 2001), the

Department of Education drafted a number of policies and guidelines as a follow up on the White Paper to ensure effective implementation of inclusive education at schools. Some of these policies and guidelines are the following:

- The report on Implementing Inclusive Education in SA (2008)
- The National Strategy on Screening, Identification, Assessment and Support (SIAS: 2008)
- Guidelines for Full-Service/Inclusive Schools (2010)
- Guidelines for Inclusive teaching and learning (2010)
- Responding to Diversity through the National Curriculum and Assessment Policy Statement (2011)

Based on the above, it is recommended that the Department of Education should:

5.6.1.1 Ensure that all schools have copies of all relevant documents

The data from interviews indicated that members of SBST, especially at farm and township schools, are not aware of the prevalence of other policy developments besides the *White Paper 6,* and they claim to have been trained only in the completion of forms on the background information of the learner for referral to specialised therapy. This implies that they have not seen copies of the documents mentioned in section 5.6.1. These findings suggest that teachers have had very limited or even no exposure to and experience of the inclusive education policy statements and guidelines in terms of information, training and/or support in preparation for the development of an inclusive system of education.

Data from the literature study confirmed that the Department of Education developed and supplied policies, guidelines and resource packs as resources to utilise in order to include learners with barriers, but teachers are not aware of the existence of such guidelines.

Based on the above, it is strongly recommended that the Department should ensure that all schools have copies of all relevant documents and that teachers are exposed to those documents as well as the training and/or support needed in preparation for the development of an inclusive system of education.

5.6.1.2 Develop capacity building through ongoing training

Data from the interviews confirmed that members of the school-based support teams are not clear on what their duties and responsibilities are with regard to dealing with learners experiencing barriers to learning. Most members of the SBST think that their role is to complete referral forms to refer learners for specialised therapy and to capture information of such learners on the school's electronic information system. *White Paper 6* (DoE 2001) states that the primary function of these teams is to put in place properly coordinated learner and educator support services through support to the teaching and learning process by identifying and addressing learner, educator and institutional needs.

It is expected of these teams to collectively develop strategies to address identified needs and barriers to learning and to focus on educator development and parent consultation and support. Accounts from the participants indicated the need for further training. This was mentioned in the context of assisting the educators to develop skills that would enable them to respond to the special needs of learners. Some participants remarked that their training as educators was not sufficient to assist all the learners with special education needs. Inclusive education would require that educators improve their skills and knowledge as well as develop new skills and knowledge.

Based on the above, the researcher recommends that school-based support teams be trained and capacitated on all policies and guidelines so that these teams are able to develop other educators and ensure stake-holder consultation. Training

should focus on supporting all learners, educators and the system as a whole, so that the full range of learning needs are met.

5.6.1.3 Reduce educator-learner ratio

The large number of learners per class was an issue reported by the participants as well as the understaffed schools. The concern raised was that a learner with an impairment demands more attention, yet no provision is made for this by the department of education with regard to class sizes. Based on the above, the researcher strongly recommends that the educator-learner ratio should be adjusted in order to enable an educator to pay effective attention to the needs of each learner. This may be accomplished by reducing the number of learners in a class, especially in the foundation phase, to a maximum of thirty in a class.

5.6.1.4 Ensure availability of enough District support staff

The *Education White Paper 6 (2001)* states that educators in mainstream education will be assisted so that they are better equipped to assist learners with special needs. *The White Paper 6 (2001)* calls for Learning Support Teachers at district level who provide support and services on an itinerant basis, and they could, if properly trained, also provide support in matters such as curriculum differentiation.

Data from the interviews and responses from the questionnaires indicated that support from the District Based Support Team is minimal because officials from the education section and therapists take a long time to monitor progress and offer support to both the SBST and referred learners. This is a consequence of overloading departmental officials and therapists with too many schools to work with, monitor and support.

Based on the above, the researcher strongly recommends that the Department of Education develop Human Resource Provisioning Norms for an inclusive system that

will result in the employment of more support personnel so that one official is given fewer schools to work with, monitor and support.

5.6.1.5 Review post provisioning system

Data from the interviews indicated that school-based support teams are strengthened by the existence of a teacher who has specialised in remedial teaching or special education. It further confirmed that teachers who did not specialise in remedial teaching struggle to respond to the learning needs of learners experiencing barriers. This situation is aggravated by ill-informed school-based support teams who cannot assist such teachers with their predicament. These struggling teachers become frustrated by the slow performance of these learners. They consequently start to develop negative attitudes towards them to the extent that these learners are ignored and thus excluded from the learning activity.

At school level, the researcher strongly recommends that a special education teacher or remedial teacher should be appointed in every school over and above the post provisioning norm of the school. The special education teacher will lend practical assistance to educators with strategies to deal with learning barriers that learners face. Alternatively, the Department of Education could award bursaries to at least one currently employed teacher per school for remedial teaching part-time with a portfolio of practical evidence as one of the pass requirements.

5.6.1.6 Provide tailor-made resources

Data from the literature study confirmed that the Department of Basic Education has to provide guidelines on resources required to implement policies while the Provincial Education Department mobilises resources required to implement policies. Data collected from participants indicated that teachers do not know which resource to use to address a certain barrier, deficiency or a learner's specific problem in order to assist him/her to learn better.

It is therefore recommended that the Department of Education supplies schools with ready to use tailor-made resources that teachers could use to address a specific barrier experienced by a particular learner. Some of these resources can be photographic cards that are designed to improve attention, as well as language and observation skills including listening, understanding, expressive language, auditory memory, sequencing, logical thought and problem solving.

5.6.1.7 Strengthen inter-departmental cooperation and stakeholder engagement for inclusion.

Data from the literature study and from interviews conducted confirmed that learners are faced on a daily basis with a host of barriers to learning which are not cognitive or scholastic. Data from both the interviews and questionnaires outlined a number of socio-economic barriers to learning that most learners have to deal with on a daily basis. Some of these socio-economic barriers include poverty, being orphaned and subsequent child headed families, unstable families, HIV/AIDS as well as foster and poor parenting.

As a result of the above, it is recommended that the Department of Education should strengthen inter-departmental and inter-sectoral partnerships and coordinate the involvement of all stakeholders involved in education, such as non-governmental organisations (NGOs) working with disabilities. These NGO's have to be brought on board because they have the necessary expertise on offer. Other departments will assist with regard to food parcels, birth certificates, getting suitable foster parents and arranging social grants for deserving learners. This partnership with the other departments will facilitate special needs learners' access to specialist services including assistive devices and specialist professionals.

5.6.1.8 Development of a curriculum for moderately and severely intellectually disabled learners.

Data from the interviews with participants confirmed that not all learners are coping with the current curriculum due to the fact that they might be experiencing a particular barrier to learning. The literature study outlined that learners' gravity of intellectual impairment differ vastly and they cannot be taught the same content across the board. The researcher strongly recommends that the Department of Education develops a curriculum for moderately and severely intellectually disabled learners. This curriculum should be adapted to these learners' cognitive level with appropriate resources availed to ensure effective curriculum delivery.

5.6.1.9 Orientating subject advisors on Curriculum Differentiation alongside Curriculum Assessment Policy Statement (CAPS)

The literature study indicated that educators in mainstream education have to be empowered so that they are better equipped to assist learners with special needs. *The White Paper 6 (2001)* calls for Learning Support Teachers at district level who provide support and services on an itinerant basis, and they could, if properly trained, also provide support in matters such as curriculum differentiation. Data from interviews with participants exposed the fact that teachers do not know how to accommodate learning needs of learners with barriers in their classes through curriculum differentiation.

In an effort to institutionalise curriculum differentiation, it is recommended that subject advisors be orientated on Curriculum Differentiation alongside the Curriculum and Assessment Policy Statement (CAPS). These subject advisors should include curriculum differentiation in their control and monitoring tools that they use to monitor curriculum delivery at schools.

5.6.2 The role of the teacher in implementing inclusive education

The role of the teacher in ensuring that the diverse learning needs of all learners in the class are catered for cannot be overemphasised. Teachers play a pivotal role in observing and identifying children in their classrooms who experience barriers to learning and in devising interventions in an attempt to address such barriers. Over and above this, the following recommendations are made with regard to teachers to ensure that their classes and teaching are not only inclusive, but also responsive to the diverse learning needs of all learners, including those who experience barriers to learning. Accordingly, teachers should:

- Present their lessons in the official school language of teaching and learning and assess learners in the same language and moreover refrain from explaining concepts to learners in the vernacular;
- Be life-long learners who read publications, periodicals and journals on recent international trends, intervention strategies and helpful practices that would help them make their classes more inclusive;
- Institutionalise curriculum differentiation by differentiating content that they teach to accommodate all learners without lowering the standard and compromising quality;
- Differentiate assessment activities in class knowing that assessment should not be pitched on the same uniform cognitive level for all learners because learners differ in the way they learn;
- Systematically take learners through the content and not rush through topics in an attempt to cover and complete all topics prescribed for the term, thus ignoring learners with learning barriers;
- Explore various intervention strategies and establish and develop community networks locally to help learners experiencing barriers;
- Change their perception on inclusive education by moving away from the medical discourse that has greatly influenced education in South Africa (and

still does), and which tends to cloud their perceptions of teaching and learning.

5.6.4 The role of parents in implementing inclusive education

Data from the interviews confirmed that due to the low level of literacy of parents, children headed households and children living with grandparents, the idea of parents taking responsibility for the support of their children in the inclusive setting is an ideal situation that would be difficult to achieve.

The researcher believes that parents play a pivotal role in their children's upbringing and the shaping of their attitudes and behaviour. Participants in this study highlighted the urgent need for parental involvement in their children's education, particularly in assisting the school to accommodate the learning needs of those with learning barriers. The following recommendations are made in this regard:

- Parents should challenge out-dated approaches and prejudices that exclude learners with barriers in the community and report schools that apply admission policies which exclude certain learners.
- Parents need to respond positively to calls from the school in respect of their children's learning deficiencies or problems and work with the school in a cooperative spirit to help address barriers that learners face.
- Parents should serve in the school-based support teams and affiliate to support groups and link to local structures and professionals striving for inclusive education and utilise these community networks by referring children.
- When the school refers the learner to a psychologist or therapist for evaluation and assessment, the parents must find time from their busy schedules to take the learner for referral and provide feedback to the school after the conclusion of these visits.

- In addition to the counselling efforts by the school in an event of trauma, parents also need to refer the learner to local religious institutions for counselling from a religious perspective.

5.7 RECOMMENDATIONS FOR FURTHER STUDY

Based on this study, the following recommendations are made for further study:

- Since only principals and teachers were part of the study, further studies should incorporate the viewpoints of parents and learners experiencing barriers to learning as well, so as to add to the literature currently available.
- Further study on the phenomenon of the implementation of inclusive education should include special and full service schools so that similarities and differences on implementation can be established.
- This study was conducted specifically in primary schools. Further study on the same phenomenon could be researched in secondary schools as well.

5.8 LIMITATIONS OF THE STUDY

The limitations of the study include the following:

- This study entailed eliciting the viewpoints of principals and teachers who are members of the school-based support teams regarding the implementation of inclusive education in primary schools and as such, only the viewpoints of these participants were included in this study.
- Furthermore, this study focused on the implementation of inclusive education in primary schools in the Lejweleputswa Education District. Accordingly, secondary schools were not part of the study and the findings can therefore not be generalised to all schools.

5.9 SUMMARY

This study set out to determine the extent of the implementation of inclusive education in primary schools of the Lejweleputswa Education District of the Free State. It further sought to establish ways and strategies that could be employed to effectively implement inclusive education in primary schools of the said district. A qualitative research design and methodology was adopted to investigate the phenomenon of inclusive education through an interview process with school-based support teams of selected primary schools. The principals of the selected schools were given open-ended questionnaires to complete. The research adhered strictly to ethical principles and was also evaluated for trustworthiness.

This study found that barriers to learning are not always rooted in the learner, but factors like the pedagogy, socio-economic circumstances like poverty as well as an inflexible curriculum manifest as barriers to learning in most primary schools. The findings from the empirical investigation largely concurred with the findings of the literature study in this regard. This study further established that the consequences of socio-economic barriers to learning such as poverty, illnesses, child-headed households, orphaned unstable families and poor parenting were so traumatic and drastic that it resulted in victims leaving school to seek employment in order to help their families. The same happened with learners with barriers who are not assisted correctly through curriculum differentiation, and who consequently do not progress to the next grade and finally drop out of school.

In order to address the problem various practices that caused exclusion of learners experiencing barriers as well as inclusive models that are responsive to diverse learning needs of all learners, were explored and strategies recommended for implementation in schools. These recommendations are intended to reduce the incidence of learner exclusion from daily learning activities and increase the level of curriculum responsiveness to the diverse learning needs of all learners, including

those experiencing barriers to learning. The limitations of the study were also recorded and recommendations for further study were outlined.

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Appendix A

education
Department of Education
FREE STATE PROVINCE

Enquiries: LV Alexander
Reference: 16/4/1/24 - 2012

Tel: 051 404 9283
Fax: 086 6678 678
E-mail: research@edu.fs.gov.za

2012 – 08 – 06

Mr T. G. Lebona
3388 Phomolong
HENNENMAN
9445

Dear Mr Lebona

REGISTRATION OF RESEARCH PROJECT

1. This letter is in reply to your application for the registration of your research project.

2. Research topic: **THE IMPLEMENTATION OF INCLUSIVE EDUCATION IN THE LEJWELEPUTSWA DISTRICT.**

3 Your research project has been registered with the Free State Education Department.

4. Approval is granted under the following conditions:-

4.1 The name of participants involved remains confidential.

4.2 The questionnaires are completed and the **interviews are conducted outside normal tuition time**.

4.3 This letter is shown to all participating persons.

4.4 A bound copy of the report and a summary on a computer disc on this study is donated to the Free State Department of Education.

4.5 Findings and recommendations are presented to relevant officials in the Department.

5. The costs relating to all the conditions mentioned above are your own responsibility.

6. **You are requested to confirm acceptance of the above conditions in writing to:**

DIRECTOR: STRATEGIC PLANNING, POLICY AND RESEARCH,
Old CNA Building, Maitland Street OR Private Bag X20565, BLOEMFONTEIN, 9301

We wish you every success with your research.

Yours sincerely

MJ MOTHEBE
DIRECTOR: STRATEGIC PLANNING, POLICY AND RESEARCH

Appendix B

P.O Box 721
Hennenman
9445

The Principal

……

Sir/Madam

REQUEST TO CONDUCT RESEARCH

I am a M.Ed. student at CUT Welkom Campus and in the process of collecting data at primary schools in the Lejweleputswa District. My research topic is **"Implementation of inclusive education in primary schools in the Lejweleputswa District."**

Methods to be used to collect data are by a questionnaire for the principal and a group focus interview for the school-based support team. (SBST).

Based on all at the above, I go on bent knees and request you to complete the enclosed questionnaire and allow me to conduct group interviews with the SBST on _____ at 14h00 or any date and time that is convenient for the school.

I hope that you find all of the above in order.

Yours fraternally

Cell no: 076222 5594
Fax: 086 6028 156
Email Address:teboholebona@webmail.co.za

APPENDIX C

IMPLEMENTATION OF INCLUSIVE EDUCATION IN PRIMARY SCHOOLS IN THE LEJWELEPUTSWA EDUCATION DISTRICT

1. PRE-DETERMINED INTERVIEW QUESTIONS

Introductory pleasantries to be conducted and a verbal confirmation to be given once again of the general purpose of the research, the role that the interview would play in the research, the approximate time required, and the fact that the information would be treated confidentially.

SCHOOL-BASED SUPPORT TEAM (focus group)

For your information, please note the following:

1.1 Participation in the interview is voluntary

1.2 Participants are free to opt out of the process at any time

1.3 All responses will be kept strictly confidential and will only be used for purposes of the study. Audio-cassettes will be destroyed after the research has been finalised.

1.4 Anonymity will be guarded at all costs

1.5 Your participation and contribution will be regarded as highly valuable.

QUESTIONS

1. Describe the greatest strength of your school-based support team.
2. Which areas in your school-based support team need strengthening and improvement?
3. How should educators be involved in the process of including learners in the mainstream who experience barriers?
4. Which resources do you as educators need so that you can make your teaching inclusive?
5. Give examples of aspects in your daily lesson plans which target inclusive education.

6. How do inclusive education support strategies help learners in your class?
7. What additional skills do educators need to effectively implement the inclusive education policy?
8. Which progress have you made as a school in terms of accommodating learning needs of learners experiencing barriers through the SIAS process?
9. What type of support does the District Based Support team offer to you to enable you to perform your duties?
10. What should the Lejweleputswa Education District do to effectively implement inclusive education?
11. Are there any other known barriers that are rife in the school besides scholastic/cognitive ones?
12. Are there any other issues or aspect of inclusive education that you think warrants discussion?

APPENDIX D

2. QUESTIONNAIRE

The Principal

IMPLEMENTATION OF INCLUSIVE EDUCATION IN PRIMARY SCHOOLS IN THE LEJWELEPUTSWA EDUCATION DISTRICT

Children are born with different abilities, including varying cognitive capabilities, and are influenced by a variety of factors (barriers) which hamper their learning and impact on their performance in- and outside the classroom. These varying scholastic, cognitive abilities and barriers to learning include, among others, varying learning styles and learning paces, cognitive development as well as physical and socio-economic barriers that impact negatively on their scholastic performance. Diverse learning needs of all learners including those experiencing barriers to learning have to be accommodated at all schools in South Africa as contemplated in the Education White Paper 6. Special Needs Education: Building an Inclusive Education and Training System (DoE, 2001) and other national policy guidelines on inclusive education.

In the light of all of the above, this study seeks to evaluate the current position on inclusive education and inclusion of learners experiencing barriers to learning and make an informed contribution that will promote inclusion of learners experiencing barriers and respond to diverse learning needs of all learners in the Lejweleputswa Education District. Your views will contribute towards finding effective ways of implementing inclusive education in primary schools in the Lejweleputswa district.

Kindly complete the following questionnaire It should not take you more than 20 minutes to complete.

For your information, please note the following:

2.1 Answer as honestly as you possibly can

2.2 Participation and completion of this questionnaire is voluntary

2.3 All responses will be kept strictly confidential and will only be used for purposes of the study.

2.4 Anonymity will be guarded at all costs

2.5 Your participation and contribution will be regarded as highly valuable.

2.6 Kindly return your completed questionnaire by using the enclosed self-addressed and stamped envelope.

1. Give your general understanding of inclusive education.

……

……

……

……

2. How are you involved in the inclusive education at the school?

……

……

……

2. What has to be done to ensure that all educators at your school understand and implement inclusive education practices in the classroom?

……

……

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……

3. In your opinion, how do learners experiencing barriers affect your school's academic performance?

……

……

……

……

4. Which resources do your school need to make it fully inclusive?

……

……

……

5. Give your opinion on the level of readiness and competence of yourself and your colleague on including learners experiencing barriers to learning.

……

……

……

……

6. In your opinion, has the way in which inclusive practices have been implemented failed, OR assisted learners experiencing barriers? Please motivate your answer.

……

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……

……

7. As a champion of curriculum delivery at your school, how do you monitor that lessons presented in classes accommodate learning needs of learners experiencing barriers?

……

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8. On the basis of your past experience, how do you think inclusive education in Lejweleputswa District can be improved?

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9. What skills do your educators possess that will enhance the inclusion of learners with barriers?

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10. In your opinion which skills teachers lack that would enable them to effectively enhance inclusive education.

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11. What is your view on the level and quality of support offered to your school by the District-Based Support team?

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