

INCLUSIVE SPECIAL
EDUCATION IN MANITOBA:
2001-2012

John VanWalleghem and Zana Marie Lutfiyya
with
Sheena Braun, Lesley Eblie Trudel, Charlotte Enns,
Barbara J. Melnychuk, Tammy Mitchell, Youn-Young Park,
and Joan Zaretsky

Manitoba Education Research Network (MERN)
Monograph Series

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In 2008 the Manitoba Education Research Network, with the support of the Manitoba Council for Leadership in Education (MCLE), launched the MERN Monograph Series. The purpose of this monograph series is to publish peer-reviewed educational research in hard copy and electronically, in English and French, as often as twice a year. Each monograph will normally report on Manitoba educational research—research that is conducted by Manitoba researchers, in Manitoba, and/or is timely, accessible, and relevant to a broad audience of Manitoba educators and their partners. A call for proposals is posted on the MERN website at <www.mern.ca>.

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INCLUSIVE SPECIAL EDUCATION IN MANITOBA: 2001–2012

An Introduction

In agreement with George Santayana's (1905) conclusion that "Those who cannot remember the past are condemned to repeat it," we wish to extend our history of inclusive special education in Manitoba. A little over a decade ago, we published what might be considered the first installment (Lutfiyya & VanWallegghem, 2001). That article was primarily written in 2000 with a brief addendum to cover the period until actual publication in 2002. In this monograph we cover the period from 2001–2012. We also include the work of six graduate students (one co-authored with her advisor) from the University of Manitoba who published either a master's thesis or doctoral dissertation during this period. Their research provides an indication of issues that were compelling during the period and extends our knowledge of how these issues might be addressed.

Before continuing we must clarify our perspectives and positions as researchers since they definitely colour the monograph's content. Both of us have worked in special education and related community services since the 1970s. We consider ourselves advocates on behalf of students and adults who have special needs¹ and have acted as advocates within the limits of our various employments and, at times, in our private lives. Thus, we are biased toward the active improvement of education for those students. Some of the content of this monograph is a personal perspective because we were participants and, in some instances, key participants in the events described. We attempt to document the history accurately and run little risk when we describe events. However when we include critical analysis, we attempt to take the perspective of the students and families who live with special needs and require individualized supports. We believe that inclusion is the "right" general philosophy, so our analysis takes full inclusion as a comparison point even though we recognize that it may be more of a dream than a realistic target in the short to medium term.

Two terms deserve definition: *inclusion* and *appropriate educational programming*. Throughout the document, we try to use *inclusion* as a philosophical construct, consistent with Manitoba Education's philosophical statement to be discussed later. We see inclusion as a commitment to general social involvement, acceptance, and value. It is not meant to be limited solely to educational practice, and within education, it is not simply an issue of student placement. On the other hand, we see *appropriate educational programming* as a legal and procedural expectation. It requires that students' learning differences be addressed through a process of

¹ We use the term *special needs* to refer generally to all students who require individualized programming or supports in order to benefit from elementary and secondary education. If appropriate, we use more specific terms to refer to students with particular diagnoses or needs.

differentiated instruction and individualized decision making which culminates for some students in the development and implementation of an individual education plan (IEP).

We also note some limitations in our content, most notably that we focus on Manitoba's public elementary and secondary school system. A graduate student, Don Shackel, reminded us that we have not included the story of inclusive special education in First Nations communities or for Aboriginal people in general and, in Manitoba especially, that is a significant omission. We tried to address that problem for this monograph but were not successful, so the gap remains. In addition, we cannot claim to reflect the experience of students in independent schools or those being home-schooled.

In one sense, the period we document can be bounded by the publication of two Manitoba government documents. In 2001, Manitoba Education² was just beginning to respond to *The Manitoba Special Education Review: Final Report* (Proactive Information Services, Inc., 1998). In 2012, the department and its professional and community colleagues were beginning to respond to Chapter 6 of the Office of the Auditor General Manitoba's latest annual report that focused on "Special Needs Education" (2012). Documents like these tend to focus public conversations. Throughout this period, there was plenty of action and discussion about inclusive special education, but most of it was framed by the *Special Education Review* and the immediate future may be framed by the Auditor General's report. We will take the *Special Education Review* as a starting point and describe many of the notable events and debates since then under the headings of legislation and policy, leadership, and personnel preparation. This sets the stage for the synopses of research by the six graduate students and the advisor. Finally, we conclude with an analysis of inclusive special education as it existed in 2012, including implications from the Auditor General's report.

Legislation and Policy

In 2001, Manitoba was still the only province awaiting legislation that explicitly mandated the expectations for appropriate education for students with special needs. Until 1998, some government spokespersons argued that the *Canadian Charter of Rights and Freedoms* and Manitoba Education's own educational support documents created an expectation for appropriate education, since there was policy/direction from government on the education of students with special needs. However, critics pointed out that nothing truly takes the place of explicit legislation. The argument seemed to end when *The Manitoba Special Education Review: Final Report* (Proactive Information Services, Inc., 1998) recommended that the Province enact such legislation.

² We use the term *Manitoba Education* throughout, although the provincial Department of Education has been titled Manitoba Education and Training; Manitoba Education, Training and Youth; Manitoba Education, Citizenship and Youth; and, most recently, Manitoba Education, during the period of which we write.

However, apart from the creation of a Manitoba Education staff team to consider the *Review's* recommendations, no new initiatives in response to the report happened for over a year. As noted in our previous article, changes in the education of students with special needs have always been impacted by political events and there was an impending provincial election in the fall of 1999. Although the review began when the Conservative party was still in place, when the New Democratic Party government was elected, advocates were further encouraged to expect action, since the party had expressed support for the recommendations in the *Review*.

In February 2000, the Children's Coalition, a consortium of advocacy groups for children with special needs, convened a public meeting to hear about progress from the newly appointed Minister of Education. The Minister sent a deputy member of the legislative assembly and several bureaucrats in his place. When the MLA and bureaucrats were unable to show a specific plan for realizing the *Review's* recommendations, the attendees clearly voiced their displeasure. Within a month the government had hired one of this monograph's co-authors, John VanWalleghem, a long-time special educator and administrator, to coordinate the Special Education Review Initiative (SERI). For the next two years, SERI advised the Minister on action related to the *Review*.

Throughout that period, SERI staff conducted various consultative processes, some with specific stakeholder groups and some open, regional, or provincial events. Through SERI, Manitoba Education established a Student Services Advisory Committee to represent the range of stakeholders during the implementation process. The Committee included representatives of advocacy, teacher, principal, school superintendent, school trustee, student services, and parent groups. The Committee continues in slightly changed format to the present. At the outset, it was mandated to advise SERI (and less directly the Department and Minister of Education) on the implementation of changes to address the *Review's* recommendations. At the same time, the process allowed the participant groups to monitor progress and keep their own organizations informed. At the inaugural meeting, SERI staff presented a work plan that organized all the *Review* recommendations under seven areas and subsequently allowed members and their organizations to track progress.

In February 2001 at the next forum organized by the Children's Coalition, the Minister presented a "Philosophy on Inclusion," which was first published in a Manitoba Education support document later that year (Manitoba Education, Training and Youth, 2001a). It stated:

Manitoba Education, Training and Youth is committed to fostering inclusion for all people.

Inclusion is a way of thinking and acting that allows every individual to feel accepted, valued, and safe. An inclusive community consciously evolves to meet the changing needs of its members. Through recognition and support, an inclusive community provides meaningful involvement and equal access to the benefits of citizenship.

In Manitoba, we embrace inclusion as a means of enhancing the well-being of every member of the community. By working together, we strengthen our capacity to provide the foundation for a richer future for all of us. (p. 1.6)

It is reiterated in most related department documents and presentations to this time.

At the 2001 Children's Coalition forum, the minister also spoke about progress on the *Review* recommendations and said that his department was committed to addressing all of them. The Children's Coalition and the Student Services Advisory Committee seemed satisfied with progress to that point and saw the philosophy on inclusion as a sound beginning.

The next major event was the release of a discussion paper, *Follow-up to the Manitoba Special Education Review: Proposals for a Policy, Accountability and Funding Framework* (Manitoba Education, Training and Youth, 2001b). As implied by the title, Manitoba Education proposed that policy, funding, and accountability actions should be coordinated. The term *policy* was used in its broadest sense to include the range of official government documents such as legislation, regulations, ministerial directives, policy papers, and support documents. These express the overt intentions of government, but funding and accountability processes often encourage behaviours that are different. With regard to special education funding, the authors agreed with Burello and Sage (1979) that school personnel sometimes act in what they see as their school's best interest by manipulating special education funding formulas to maximize revenue. For instance, as seems to be the case in Manitoba, there is anecdotal evidence of instances when school divisions exaggerate student needs to obtain funding, contrary to the intent of the policies. Similarly, accountability processes are meant to influence school practices (e.g., Ladd, 1996), but school personnel sometimes "game" the system (Figlio & Getzler, 2002) by over-identifying students as having special needs, particularly if they perceive that meaningful consequences are attached to poor student performance scores. Thus, government must try to align funding and accountability processes to support the intent of any policy changes, including legislation.

The SERI staff used that discussion paper as the foundation for policy discussions with stakeholders and communities. In addition, a three-year pilot project to investigate possible special education funding changes was initiated in seven school divisions and a process for improving individual education plan (IEP) development and reporting was piloted in conjunction with Saskatchewan Education.

While major policy (and funding and accountability) change was in development, Manitoba Education made progress on several of the more specific *Review* recommendations. The department published *Towards Inclusion: From Challenges to Possibilities: Planning for Behaviour* (Manitoba Education, Training and Youth, 2001a), a support document to encourage better practices related to challenging student behaviour. It was followed a short time later by *Towards Inclusion: Tapping Hidden Strengths—Planning for Students Who Are Alcohol-Affected* (2001c). Both documents responded to Review recommendations to offer support to educators in areas of special education that were particularly challenging. In subsequent years, Manitoba Education published similar support documents related to positive problem solving for schools, families, and communities (2004); autism spectrum disorder (2005a); preventing violence and bullying (2005b); supporting students who are Deaf and/or hard of hearing (2009); services for students who are blind or visually impaired (with Healthy Child Manitoba, 2011); promoting positive behaviour in classrooms (2011); and other topics that had not been addressed prior to the review.

Concurrently, the department began incremental changes to the low-incidence funding process. Since 1980, Manitoba Education had provided special education funding through a combination of two mechanisms—block funding based on enrolment and low-incidence funding based on student-specific applications. The *Review* criticized aspects of the low-incidence funding process. Manitoba Education's changes since then have attempted to reduce the stigmatization and negativity of a system that forced parents and educators to make annual applications based on a description of students' special education category and the severity of their needs. The changes recognized that the philosophy of inclusion and the field in general were attempting to move toward a strengths-based understanding of special needs. Over the course of several years, the department would decrease the frequency of application for many of the funding categories, thus decreasing the need to deal with this negative process. Autism spectrum disorder was eventually added as a specific funding category. Generally, these changes have been very well accepted by schools and parents.

More radical funding changes were considered but not implemented. The department's 2001–2004 pilot project investigated elimination of the Level 2 category for funding students identified with severe behaviour disorders. The pilot project replaced the category with a commensurate block transfer of funds and had the distinct advantage of decreasing the time and effort involved in individual applications in a category that was quite difficult to define. However, after the three-year trial period, some of the pilot school divisions worried that they stood to lose significant funds and, thus, preferred to return to individual applications. Thus the Level 2 category of severe behaviour disorders continues to this day. Another trial process for funding began in Seven Oaks School Division in the 2012/2013 school year.

The SERI staff also held discussions with parents of students who were identified and funded under disability categories such as Deaf and/or hard of hearing, blind or visually impaired, and multiple handicaps. Parents were asked whether they would like to see the individual funding application process eliminated for their children in favour of increased block funding to school divisions. Parents recognized that the process encouraged labelling, but they felt that this identification process was the clearest way to ensure their child received extra support. In addition, many parents of children who were not already receiving funding still preferred the student-specific process because they hoped that more articulate applications in the future would result in their child becoming eligible. Thus, the student-specific funding application process continues unchanged in many aspects, although the department has lessened its negative impact somewhat, primarily by lengthening many approval periods so that applications occur much less frequently.

The most anticipated and far-reaching policy change would be legislation that mandated appropriate educational programming for all students, including those with special needs. That process began in November 2003 with the introduction of Bill 13, *The Public Schools Amendment Act (Appropriate Educational Programming)* in the Legislature. On May 12, 2004, the bill received all-party concurrence and passed third reading. On June 10, it received Royal Assent to come into effect when regulations received approval, which occurred on October 28, 2005. The delay in implementation allowed departmental staff time to discuss the legislation and impending regulations with communities and the education field while schools and educators prepared for implementation. The department's website explains the legislation as supporting its philosophy of inclusion and helping all students to be engaged meaningfully in the school experience. It states, "students with special needs should experience school as much as possible like their peers without special needs" (<www.edu.gov.mb.ca/k12/specedu/aep/inclusion.html>).

The legislation and regulations were supported by several other initiatives and documents. Notably, Manitoba Education published: *Appropriate Educational Programming in Manitoba: Standards for Student Services* (2006b), *Appropriate Educational Programming in Manitoba: A Formal Dispute Resolution Process* (2006a), *Appropriate Educational Programming: A Handbook for Student Services* (2007), and *Student-Specific Planning: A Handbook for Developing and Implementing Individual Education Plans* (2010b). These documents addressed the most important policy areas that arose from the legislation. The *Standards* provided much of the detail about how the department expected schools and school divisions to apply the concept of appropriate education in the following areas: policy, access, early identification, assessment, student services planning, individual education planning, student discipline, dispute resolution, co-ordinated services, and professional support. The *Standards* clearly specified those practices that must or should be done, assigning most responsibilities to the school division as a whole but assigning some specific responsibilities to principals.

When students have special needs that require individualized planning and programming, the decision-making team consists of the teacher, parents, the student, and whichever school personnel are assigned. If parents and the school disagree about the most appropriate programming or placement for the student and cannot resolve their problem, using the local process available, the regulations provide for a dispute resolution process.

Each school division has a process available to parents when they are in disagreement about their child's education. It is not different for parents of children with special needs. It begins at the school level, always in the hope that the people directly involved can find a mutually agreeable outcome. Failing that, it can proceed to an appeal to the school division. If the parent of a child who has an IEP still does not agree with the decision made by the board of trustees in the division, he or she can file for a review and the Department of Education will consider whether the issue should be brought to a dispute resolution committee. The *Formal Dispute Resolution Process* document (Manitoba Education, Citizenship and Youth, 2006a) describes the steps involved, including the fact that, as a final level of appeal, the disputants can ask the Deputy Minister of Education to review and change the dispute resolution committee's decision.

The *Handbook for Student Services* (Manitoba Education, Citizenship and Youth, 2007) is essentially a reference guide to all the department and government resources that support appropriate educational programming. It provides information under the topics of legislation, ministerial letters/directives, regulations, standards, policies and protocols, guidelines, and support documents. It provides a valuable resource for school leaders who want to further their knowledge about the government's intentions.

The IEP support document updates earlier support documents. For the student with special needs, the student-specific planning process and resulting IEP document is the foundation of appropriate educational programming. The document provides the parent, student, and school personnel who engage in IEP planning with a clear description of who requires an IEP and what an effective process is—the key components being development, writing, implementation, and review. The document described some of the practices first attempted during the pilot project with Saskatchewan Education, notably a suggestion that student outcome rubrics can be developed to guide the reporting and review components. However, a specific process for measuring or documenting progress is not mandated.

In conclusion, Manitoba Education has mostly met the expectations many advocates held in 2001 for advances in the policy area. Manitoba not only has created a mandate for appropriate education but has provided a plethora of supporting policy and documents to define what it means. Parents and other advocates have a much stronger foundation for working with school personnel and holding expectations that might challenge them to improve their programming. It can even be said that the funding process has adapted to be more sensitive to students and parents, although it has probably not changed as much as some had hoped when the *Special Education Review* report was published.

Of the three interrelated areas that SERI identified in 2001—policy, funding, and accountability—it is the latter area that seems to have received the least attention. While there are much clearer descriptions of what is meant by appropriate education and the major processes for achieving it, it is hard to know whether schools are, in fact, providing appropriate education for all students or even improving in their provision. Of the many approaches to analyzing educational accountability, especially as applied to special education, one of the best known is the three domain model proposed by the National Center on Educational Outcomes (Ysseldyke et al., 1997). Their three domains are educational inputs and resources, educational processes, and educational results for systems and individuals. Ladd (1996) provided an explanation of how educational accountability systems were evolving in the 1990s from a focus on inputs and processes to a focus on results, particularly results based on measures of student learning. Since the 1998 release of the *Special Education Review*, it could be argued that, while Manitoba has clarified many special education **processes**, it has made little progress toward improved accountability, and virtually no progress toward accountability based on educational **results** for students with special needs.

Manitoba lacks publicly accessible, comprehensive data in all three domain areas (inputs, processes, and results) recommended by Ysseldyke et al. (1997). This causes major questions to go unanswered and stifles informed public debate. We do not know whether school divisions are providing minimum services, but we know from anecdotal evidence (e.g., Kresta, 2012a) that students and parents experience widely disparate services from one school division to another. We do not know whether those disparities are due to unequal resources or to poorer application of resources or to other factors. For the most part, the public does not know whether the processes specified in the *Standards* document are being implemented, although we do know that the 2012 Auditor General's report noted that some divisions had not complied with expected changes to divisional policies. However, the department is currently in year 3 of a Review and Reporting Process which specifically reviews compliance with policy and regulation and the files of a sample of students who receive low-incidence funding. One-third of the province's divisions are reviewed each year. The Review and Reporting Process culminates with feedback to individual school divisions. However, there is no provision for public reporting. We think that a public report that aggregated the results for all the divisions would contribute to a more informed public conversation. Perhaps most importantly, we have no provincial or school division data about whether students with special needs are achieving expected learning outcomes, despite clear directions on how to use the individual education plan in a manner that would allow that data to be created and, presumably, reported.

The department does no explicit, public reporting about students with special needs and has never specified how schools and school divisions should indicate progress in their own public reporting. In contrast, the department releases a periodic report of provincial results on various provincial, national, and international assessments and an annual report on graduation rates. Manitoba Education has also stated

its intention to improve the results data available regarding students who have Aboriginal status. Where, we wonder, is a similar commitment to providing data regarding special needs?

Public reporting on student progress is complex. Students with special needs cannot be identified, and their progress toward individualized goals is not the only measure of progress. It should be noted that many students with special needs participate in the provincial curriculum and their progress toward those academic goals is included in public reports, as they are for any student. The reporting of progress toward individualized goals is required as part of the IEP process and when the process is effective parents will know about their own child's progress.

Thus, in the past decade the policy of appropriate education has generally become clearer, particularly through legislation and the *Standards* document. However, the provincial conversation lacks much of the information that would allow effective analysis about whether that policy is having the desired effects.

Leadership

Collectively, educational leaders must take responsibility for areas of both progress and stagnation since 2000. Analysis of leadership effectiveness in the development of inclusive educational practices and outcomes must consider several different levels: at least the classroom, the school, the school division, and the Department of Education. To those we add advocacy and professional organizations, since they have significant influence on special education in Manitoba. We will discuss each of those briefly with the understanding that our perspective is idiosyncratic and for the most part cannot be documented with facts or public records. Nonetheless, *The Manitoba Special Education Review* created a hope for change, and all change is dependent on how inspiring and competent the leadership proves to be. We would be remiss if we failed to provide at least a limited picture.

The Classroom

This level essentially refers to classroom teachers. The research report in this monograph that is written by Sheena Braun and Charlotte Enns addresses many of the issues, so we will not get into those here. What we can say is that there seems to be general acceptance among teachers that inclusion is an expectation to which they must pay at least lip service. Some act as if they hope that it will go away but recognize that they cannot purposefully ignore it. In our opinion, that is one reason why a legislated mandate is so necessary. Other teachers seem to want to pay more than lip service but feel overwhelmed by the needs of their students and their own lack of preparation and expertise. Still others seem to just do it, perhaps because they are already skilled teachers or because they believe it is their professional duty to work at improving their skills.

One story provides a great example of what happens when a student with special needs connects with a “good” teacher. A couple of years ago, a friend asked John to help her niece whose seven-year old son had recently been diagnosed on the autism spectrum. His parents and his teachers had always known that the boy was a little “different” and had been making accommodations all along. However, the diagnosis upped the stakes in undefined ways and the parents were worried about how the school would continue to support their son, particularly as the end of a very successful school year was near and transition to the next grade was imminent. John talked with the mother and she asked whether he would attend the year-end IEP and transition planning meeting. He agreed with the understanding that he probably would say very little but would try to be supportive and would help the parents to talk it through after the meeting.

The meeting was chaired by the school psychologist and began with the classroom teacher and the resource teacher summarizing progress during the year and their analysis of which strategies worked best. It was a collegial, constructive environment, and John was very impressed with everyone’s teaming skills to that point. Unfortunately, the next-year teacher was not able to be present for the early part of the meeting. When she arrived, she explained that she had been tied up with end-of-year activities with her class and felt rushed by the expectation to attend the meeting. Her body language expressed discomfort and impatience. The school psychologist provided a sensitive, positive summation of the discussions she had missed, ending with a fairly detailed description of the strategies that the rest of the team agreed were most promising for continued success. He asked the next-year teacher whether she thought it would be possible to implement that approach in her classroom. She started her reply by saying something like: “This is why I really don’t see why I had to take time away from my kids at such a busy time.” John immediately feared for the worst, expecting the teacher was about to express recalcitrant, anti-inclusion attitudes that would see battle lines drawn between that teacher and the parents. Then she continued: “Of course that will work out fine because that’s the way things operate in my classroom anyway,” and proceeded to succinctly explain how her standard operating procedures seemed highly individualized and accommodating. John, of course, blew a sigh of relief and was able to have a pleasant post-meeting debriefing with the parents. Everyone left with hopeful anticipation for the coming year.

Real change toward appropriate educational programming for students with special needs depends more on the classroom teacher than any other individual. As Hattie (2009) notes from his synthesis of meta-analyses of effective schooling, “*within-school factors, in particular teacher quality, account for a much larger proportion of variance than between-school factors*” (p. 108). He goes on to cite Nye, Konstantopoulos, and Hedges (2004) in stating that “*somewhere between seven and 21 percent of the variance in achievement gains was associated with variations in teacher effectiveness*” (p. 108). This is the person who will spend the most school time with the student and this must be the person who accepts the challenge of both understanding the intent of inclusion and developing the skills to

deliver differentiated and even individualized programming. Since every teacher must be the critical leader in the classroom of each student, Manitoba will not have succeeded in providing appropriate education until all 13 thousand teachers in the province are competent and willing to do so. Some teachers, like the one in John's story, are well on their way. Many others have far to go. More on this later when we discuss the Braun and Enns report.

One recent and relevant development in Manitoba has been the work of Dr. Jennifer Katz at the University of Manitoba. She has introduced her three-block model of universal design for learning through coursework, professional workshops, and a book (Katz, 2012). There is an expanding belief that her model will significantly fill the gap in teacher skills related to inclusive education.

The School

Leadership in the school is often vested in a few key people. The principal is the most obvious but, when it comes to appropriate educational programming, the resource or support teacher is often just as important because she or he mediates much of the school interaction with the student who has special needs. Other support professionals, such as the school psychologist in the story above, also take on school leadership roles. For these staff, a focus on appropriate educational programming creates new expectations, not so much in the administrative or instructional or clinical expertise that they bring, as in their process expertise. Someone has to lead those mediating processes, such as IEP meetings, that are uniquely the realm of inclusive special education. (This is not meant to minimize the importance of content area competence. A recent public discussion of the Auditor General's 2012 report included significant complaints about inadequate training in specific student needs among teachers and other members of the school team [Kresta, 2012a].) At its most fundamental, appropriate education depends on a team's ability to recognize when a student needs something out of the ordinary and then organizes to deliver it. In Manitoba, the ordinary educational process is considered to be the published provincial curricula supported by differentiated instruction (Manitoba Education, Training and Youth, 2001a). Dealing with the extra-ordinary takes process leadership.

However, someone has to organize the environment where individualization is valued for all students, where teaming is systematic and efficient, where creativity in meeting challenges is encouraged, and where learning from successes and mistakes is the basis for doing things better next time. That formal leadership is typically the role of the principal. Waters, Marzano, and McNulty (2003) made a compelling case for the importance of leadership responsibilities, listing 21 "that are significantly associated with student achievement" (p. 2). They noted that there has long been a perception that school leadership makes a difference but they conducted a meta-analysis of studies over the preceding 30 years to verify that belief. They concluded that "The data from our meta-analysis demonstrate that there is, in fact, a substantial relationship between leadership and student achievement. We found that

the average effect size (expressed as a correlation) between leadership and student achievement is .25" (p. 3).

Hattie (2009) cited Waters et al. and many others to confirm the critical role of school leaders in improving student achievement. He became even more specific, distinguishing between instructional leadership and transformational leadership and showing the advantage of the former over the latter. "Instructional leadership refers to those principals who have their major focus on creating a learning climate free of disruption, a system of clear teaching objectives, and high teacher expectations for teachers and students" (p. 83). Thus, all schools benefit from effective leadership, including those schools that target appropriate education.

Effective leadership is composed primarily of people skills, and Manitoba's system does not seem to focus very specifically on developing them. Joan Zaretsky's report further on will describe how principals feel about this lack of process expertise (and content expertise for that matter), but we extend that problem to the other school leaders, too. Our schools need distributed leadership if appropriate educational programming for students with special needs is to be achieved. School leaders require team leadership skills that are not being systematically taught in Manitoba. It seems that there are too many expertise gaps to expect that we will catch up on all of them any time soon. However, we could stand a better chance of catching up on the content gaps if we first worked effectively as teams, since that would allow us to set priorities about which content gaps to address. In our opinion, that is not yet a systematic approach in most schools.

For improved process skills, principals and other school leaders could certainly start with the department's *Standards for Student Services* (2006b) document to learn what specific leadership responsibilities they should provide. According to that document (pp. 14, 17), the principal is responsible for ensuring that

- a student is assessed as soon as reasonably practicable and referred for a specialized assessment if the in-school team is unable to assess why a student is having difficulty meeting the learning outcomes and is of the opinion that the student cannot meet learning outcomes even with differentiated instruction and accommodations
- an IEP is prepared for a student who is unable to access the regular curriculum
- the IEP
 - is prepared with the assistance of the student's teacher(s) and other in-school personnel
 - takes into account the student's behavioural and health-care needs (if any)
 - is consistent with provincial protocols respecting a student's transition to and from school
 - is updated annually, or sooner if required by a change in the student's behaviour or needs

- a student's parents and the student, if appropriate, are given the opportunity to participate in preparing and updating the student's IEP and to be accompanied and assisted by a person of their choosing

When school leaders assume these responsibilities in their schools and monitor the implementation of IEPs and assessment of student progress, their schools are well started toward realizing the intent of appropriate educational programming.

We are aware of schools where principals have taken the initiative and made huge strides toward creating a more inclusive environment. Inclusive Education Canada (2011) has documented some of these examples, including two from Manitoba. They give us hope and serve to remind us that more could be accomplished if more school leaders took the same level of responsibility.

The School Division

This is a level where we would hope to see meaningful, systemic change. Since the delivery of education in Manitoba is mostly delegated by the legislature to school boards, Manitoba's regulations and *Standards for Student Services* also place the responsibility for providing appropriate education primarily on school boards. At a practical level, the boards should bring their policies in line with the provincial legislation, regulations, and standards and then assign responsibility for implementation to the divisional administrative staff. However, despite the seven years since the law was proclaimed, many school boards have not provided that degree of leadership, in our opinion, even though the Manitoba School Boards Association publicly endorses the intent of the law. All divisions could claim to be making progress, but we question whether that progress is rapid enough. We are aware of many more special education clusters and self-contained classrooms, particularly in larger school divisions, than we would have expected if those divisions were truly attending to the intent of the legislation and the philosophy on inclusion.

A quick perusal of school division websites indicates that only about half show any explicit attention to the concept of appropriate education, whether in policy or mission or specific program information. This is consistent with the gap identified by the Auditor General's report (2012). The first requirements of the *Standards for Student Services* (p. 8) are

1. that school boards should revise existing policy and develop new inclusive education policy to ensure compliance with existing constitutional and provincial human rights legislation and with provincial legislation, regulation, policy, and guidelines
2. that those policies should be made available to the public

Thus, we are disappointed to see such poor compliance. On the other hand, we are aware of school divisions that have taken the *Standards* document as a guideline for assessing and improving divisional student services. Hopefully, Manitoba Education's Review and Reporting Process will identify the school divisions' policy gaps and encourage greater progress.

School division leaders also have the opportunity to foster conversations about student achievement. School divisions have a responsibility to report annually to their communities and that report is meant to include information on student services. Again, a quick perusal of divisional websites and annual reports to the community shows that few divisions are providing data about student achievement and none seem to report on achievement for students with special needs. The IEP is the obvious standard for judging achievement for students with special needs but no division seems willing to post information about how it is doing in achieving expected outcomes for students with special needs. We recognize that information cannot be individually identifiable. On the other hand, it is practical in all but the smallest divisions to summarize division-wide data about achievement of IEP goals without identifying which students are being included. As an analogy, some divisions report results on provincial grade-level assessment results and, while that generally identifies a target group, no one worries that individual identities can be inferred.

Manitoba Education

To a certain extent, the department's responsibilities were dealt with in the previous section on legislation and policy. There has been a great deal of progress at all levels of policy development, from legislation through to support documents. The department's student services staff has been trained in differentiated programming and universal design and seem to take a fairly consistent message into the field. As with the school boards, the question we ask is whether the expectation for compliance is strong and rapid enough. Now that the policy is in place, we look to the department for action plans to foster implementation in the schools. The *Standards* document, particularly, is a wonderful outline of the practices that we should see in the field. It is now used systematically as a foundational document for assessing school division compliance when department teams review divisional programming every three years.

The department's review processes fall under the Planning in Education initiative, which began around the same time that SERI was initiated. There was an intentional link between the two processes. The original student services reporting and review process, the Annual Division Action Plan, was mandated in 1989 and was incorporated into the Divisional Planning Report in the 2000s. The now tri-annual divisional report is to include specific reference to student services. At first, the department only required a written summary report and annual written reports by each division to its community. However, in 2007, the department implemented the tri-annual Review and Reporting Process accompanied by a site visit from a

department review team. The department is now in the second three-year cycle and any reporting about results is provided solely to the division administration. We would have liked to see increased focus on public reporting about how divisions in aggregate are meeting the legislative, regulatory, and standards requirements.

Like school divisions, Manitoba Education has the opportunity and responsibility to foster discussions about student achievement and to do so in a manner that integrates consideration of students with special needs. To date, the department's periodic reports on student achievement (e.g., *A Profile of Student Learning and Performance in Manitoba, 2006–2010*) have not included information about students with special needs. In fact, the department has stated the intention to include information about students with Aboriginal heritage while remaining silent about the other two populations that are targets for equity programming—students with special needs and students for whom English is an additional language.

The department's response to the Auditor General's report (2012) indicated that the department would explore means of reporting on "attendance, credit achievement and graduation." However, these measures are not meaningful learning outcomes for students whose IEP goals fall outside the provincial curriculum. The only pertinent measure of those students' educational achievement is whether their IEP goals are being achieved. We recognize that focusing on IEP results has inherent weaknesses, notably the uneven standards that different IEP teams will set. However, informed discussion requires the best available data and IEP achievement is the only learning outcome we have. Thus we would hope to see a multi-pronged approach between the department and school divisions, including the following:

- strengthening educators' skills in setting measurable IEP goals
- strengthening educators' skills in evaluating progress toward IEP goals (i.e., expecting that the student outcome rubric be used as a universal process)
- schools and school divisions reporting to the department on cumulative results for achieving IEP goals
- the department reporting provincial cumulative results in the same way that results are reported for other provincial measures of student achievement

We also believe that this approach would align more closely with the actual intent of the Auditor General's recommendation "that Education work with school divisions to develop methods of monitoring the outcomes being achieved for students with special needs" (p. 291).

As part of its leadership role, the department facilitates discussion groups in several areas of importance—curriculum, finance, Aboriginal issues, et cetera. The Student Services Inclusive Education Advisory Committee has served that purpose for students with special needs since 2000. It allows the sharing of information and discussion between the department and major stakeholders, and that is a positive undertaking. However, the Committee has not worked from a specific work plan since early in its tenure. This mitigates some of its positive effect and should be rectified.

Thus, we believe that the department showed steady leadership during the years immediately following the publication of the *Special Education Review*, but the pace of improvement has declined more recently. Some of that is due to the lack of a forward-looking planning process that includes specific goals and timelines. However, the infrastructure for regaining the pace of improvement is still in place. For instance, one of the positive initiatives by Manitoba Education has been maintenance of the advisory committee on student services. This body guarantees at least a certain level of openness to informed input and even critique, and that is a solid basis for ongoing improvement. In addition, the *Standards* document is available for attention and the relatively new IEP support document presents a significant opportunity for emphasizing that most fundamental process of appropriate educational programming. Lastly, the Review and Reporting Process holds promise for not only helping school divisions to improve but also for gathering the type of data that could inform public discussion and mitigate the department's accountability gap.

Advocacy Organizations

Perhaps not surprisingly, there appears to have been less advocacy activity since the passage of *The Public Schools Amendment Act (Appropriate Educational Programming)* and its supporting materials. For example, the Children's Coalition has organized infrequent progress meetings, and it does seem that this decline in community advocacy has contributed to a general decline in provincial progress toward implementing the recommendations of the *Special Education Review* (1998). There is little question that government, like many public organizations, can only focus on a limited number of priorities at any one time. If appropriate education is still an area that requires progress, and we believe it is, then advocacy groups must continually challenge the government as a means of maintaining the profile of this topic.

There are signs of more activity recently. The Children's Coalition organized a shared event with the Manitoba Council for Exceptional Children in February 2011 to explore the question "Are we there yet?" with regard to the *Special Education Review*. Following the Auditor General's report (2012), the Children's Coalition wrote a response letter to the Minister of Education (Kresta, 2012b) and organized a parents' forum to discuss the report. The letter confirmed parent concerns about many of the issues raised by the Auditor General and suggested a timeline for a response by Manitoba Education. The parent forum was the first suggestion and the resultant report (Kresta, 2012a) provides substantial fodder for discussion by the department. However, there has been no indication that the department accepted the Children's Coalition's other recommendations that would culminate in an action plan.

The Auditor General's report (2012), while aimed at Manitoba Education, also suggests that there is a need for advocacy at the local or school division level. Most of the ongoing responsibility for appropriate educational programming is devolved to the school divisions, so parent and community groups could be holding schools

and school divisions accountable for meeting those responsibilities. We suggest that this is a specific role for school trustees and parent advisory groups, but it could also be a target for regional and provincial advocacy groups.

One heartening development has been the increasing commitment to the idea of appropriate education by the Manitoba Association of Parent Councils (MAPC). It can only make the advocacy task of special interest groups easier if the general parent group reinforces their voice.

Professional Organizations

We expect leadership from professional groups related to student services such as the Student Services Administrators' Association of Manitoba (SSAAM) and the Manitoba Council for Exceptional Children (MCEC). Manitoba's major educational professional organizations—the Manitoba Teachers' Society, the Council of School Leaders, the Manitoba Association of School Superintendents, and the Manitoba School Boards Association—have publicly recognized appropriate educational programming and inclusive education as legitimate mandates and have encouraged their members to be supportive. All four groups have committed themselves generally to social justice issues and have embraced inclusion as an important aspect. They have the ear of government in a way that SSAAM and MCEC do not and, along with MAPC, they provide a less self-serving foundation for advocacy. If the average parent, teacher, principal, superintendent, and trustee accepts the importance of appropriate educational programming, there is a much greater hope that it will remain a priority and see continued progress.

Personnel Preparation

Over the last decade, the essential elements of teacher preparation in Manitoba have remained largely the same. In order to qualify for provincial certification, individuals must earn an initial degree in a content area and then complete a Bachelor of Education (B.Ed.) degree. The latter is the equivalent of two years of university study, including an extensive supervised school practicum. B.Ed. students spend 24 weeks in the practicum, which are interspersed over the two years of study. Pre-service teachers are still prepared for general classroom teaching and, regardless of the focus of one's B.Ed. program (e.g., early, middle or senior years), a certified teacher may be hired to teach any subject area and any age of student (Lutfiyya & VanWalleghem, 2001).

The largest recent change in personnel preparation occurred in 2008 when the then Minister of Education introduced the "diversity requirement." All B.Ed. students must now have at least one three-credit-hour course in inclusive special education, and an additional three credit hours in a related area that addresses teaching the diversity of students in the province's school system. At least in some of the five B.Ed. programs in Manitoba, there is an increasing emphasis on the concept of universal design as a helpful and effective approach.

Post-Baccalaureate Training Opportunities

Teachers in Manitoba may continue their studies in a post-B.Ed./advanced diploma program that is now offered at four of the five education faculties. This 30-credit-hour option provides further studies in several areas, including inclusive special education, counselling, educational administration, adult education, and the full range of curricular areas. In addition to earning a Post-Baccalaureate Diploma in Education (PBDE), students may also apply for a certificate from Manitoba Education in special education, counselling, English as an additional language, or educational administration (each certificate has specified, required coursework). The province does not require teachers to have any training or certification other than the B.Ed. The exceptions to this remain certain clinical positions (e.g., school psychology, speech and language pathology, social work, reading, physical therapy, and occupational therapy) where a national accrediting process exists (Lutfiyya & VanWallegghem, 2001).

Over the last decade, various organizations have sought cohort offerings of the core, required courses needed for the provincial special education certificate. For example, the University of Manitoba has worked with the Manitoba First Nations Educational Resource Centre (MFNERC) to do precisely this with two cohorts of First Nations educators, who were subsequently able to apply for the Manitoba Education certificate. Another two school divisions have sponsored similar opportunities for their employees, in order for all of their resource and special education teachers to qualify for this certificate.

While it was not addressed in the *Special Education Review* (1998), Manitoba Education has recently created a certificate for school counsellors. According to the Manitoba Education (n.d.) website, “The certificate requirements support and recognize the professional preparation and education necessary to effectively carry out the responsibilities of a school counsellor within the school setting.” However, the website explains that, like the special education and administrator certificates, the counsellor certificate is recommended but not mandatory.

Graduate Programs

Brandon University, the Université de Saint-Boniface, and the University of Manitoba offer M.Ed. programs and the University of Manitoba offers a doctoral program as well. As noted in our earlier article, the emphasis of the graduate program is to “develop the leadership, research and planning abilities of graduate students while also providing them with more advanced and specialized training in their chosen field” (Department of Educational Administration, Foundations and Psychology, n.d. as quoted in Lutfiyya & VanWallegghem, 2001, p.88). The University of Manitoba has offered a Ph.D. with an emphasis in inclusive special education twice (the first group started in 2003 and the second in 2010). The University of Manitoba has also supported doctoral students in more individualized programs to focus on inclusive special education. In this monograph, we highlight the work

of recent M.Ed. and Ph.D. graduates from the University of Manitoba in inclusive special education. These reports provide an excellent overview of the interests and type of research being carried out by graduate students who are, almost always, full-time educational professionals as well.

A scan of the research produced by these graduate students provides an interesting indication of the issues they face. Most thesis work focuses on various aspects of the work of educators to support and educate students with disabilities and/or other difficulties in school. Some, like McLean (1998) and Updike (2005), have examined the importance of educator perspectives about, and commitment to, the inclusion of students with disabilities. Cantor (2010) examined the experiences of Aboriginal and immigrant families who had a child with a disability in the school system. Schwartz (2011) undertook a critical discourse analysis of the special education textbooks most commonly used in Canadian universities. She examined the portrayal of students described as having significant and/or multiple impairments. A fourth group of graduates studied particular programmatic or curricular interventions. For example, Wells (2011) looked at the efficacy of inquiry-based learning for students with disabilities. Ashcroft (2011) documented what accommodations university-based nursing programs provide to students with disabilities in Western Canada.

Paraprofessionals

There has been no significant change in either the role or preparation of paraprofessionals (often referred to as “educational assistants” in this province) since our initial article in 2001. All school divisions use paraprofessionals to help deliver their special education and support services. Paraprofessionals are not required to have any particular training or preparation but must be of legal majority and free of a criminal record. The province still requires school divisions to hire a registered nurse as a paraprofessional when a student has significant specific health care needs. Paraprofessionals may take a variety of workshops or courses, such as first aid and CPR. A few formal training programs to develop paraprofessionals to work in schools, day care, and social welfare agencies are in place (Lutfiyya & VanWalleghem, 2001). Manitoba Education has released *Educational Assistants in Manitoba Schools*, a guidelines document regarding paraprofessionals (Manitoba Education, 2009).

In summary, pre-service educators today receive an orientation to the needs of students who have disabilities, learn in different ways, and/or have different cultural backgrounds. A number of school divisions and other local education authorities have made it easier for their staff members to successfully complete a PBDE and/or M.Ed. degree in a relevant area of study.

However, as will be evident in the following sections by Braun and Enns regarding teachers and Zaretsky regarding principals, educators in the field do not feel completely prepared for the challenges of appropriate educational programming. There remains much work to do before Manitoba can claim that all its educators are adequately prepared to meet the mandate articulated through legislation.

Empirical Research

Inclusive special education received a fair amount of academic attention from 2001–2012. One indicator is the number of graduate students who have concentrated in this area. We distributed a general request for contributions to the three faculties that offer graduate programs (Brandon, Manitoba, and St. Boniface). We asked that they forward our invitation to any recent graduate student who had completed a thesis or dissertation dealing with inclusive education in Manitoba. Submissions could address the graduate's thesis in whole or part. We accepted the six submissions that met the criteria, all of them from University of Manitoba graduates. The topics (and in parentheses the authors) of these reports include decision making by youth with intellectual disabilities (Melnychuk); the connection between teacher beliefs about inclusion and their classroom practices (Braun and Enns); school division planning practices (Eblie Trudel); information management for student transition to adulthood (Park); perspectives of northern principals regarding the legislative amendments (Zaretsky); and the change process towards greater inclusion in a middle school (Mitchell). The authors' work experiences include student services administration, school and school division leadership, policy analysis, university instruction, and teacher support and professional development. We committed to letting the authors speak with their own voice, so the sections do not follow a single format. However, they collectively reflect the tip of the iceberg for the many issues that merit attention regarding inclusive special education in Manitoba.

DECISION MAKING BY YOUTH WITH AND WITHOUT INTELLECTUAL DISABILITIES: A COMPARISON OF PERCEPTIONS³ BY BARBARA J. MELNYCHUK⁴

Context and Purpose

The concept of involvement in decision making by Manitoba adults (over the age of 18 years) living with an intellectual disability is supported by *The Vulnerable Persons Living with a Mental Disability Act (VPA)* (referred to as Chapter V90 of the *Continuing Consolidation of the Statutes of Manitoba*), which received assent in 1993. The content of this Act is important to Manitoba educators and acts as a backdrop to my research. It is critical for educators, parents/guardians, and supportive others to know what is contained in this Act so that we can work together to help prepare our students for their adult responsibilities.

Under this Act, a vulnerable person is defined as “an adult living with a mental disability who is in need of assistance to meet his or her basic needs with regard to personal care or management of his or her property” (Dozar & Flaig, 2005, p. 10). According to the VPA, vulnerable persons are presumed to have the capacity to make decisions that affect themselves and should be encouraged to make their own decisions independently or with the assistance of their support network. In spite of this type of legislation, adults with intellectual disabilities (ID) are frequently prohibited from making decisions due to the assumption of incompetence (Lutfiyya, Updike, Schwartz, & Mactavish, 2007). Therefore, it is critical that educators assist and support all students in developing their capacity for making decisions. I hope this study will encourage educators and parents to examine the opportunities afforded students with and without ID to practise decision making in the school setting, and to explore ways to expand those opportunities.

The purposes of my study were (a) to compare the perceptions of two groups of high school students regarding their opportunities to make decisions in the high school setting, and (b) to find out how teachers, educational assistants (EAs), and an administrator explain any similarities or differences in the perceptions of the two groups of students.

³ Melnychuk, Barbara J. (September 21 2010). *Decision making by youth with and without intellectual disabilities: A comparison of perceptions*. University of Manitoba M.Ed. thesis. <http://hdl.handle.net/1993/4212>

⁴ Barbara Melnychuk was a student services coordinator in an urban school division at the time of her studies. She is now employed with Manitoba Education as a manager in the Program and Student Services Branch.

Methods

This was an exploratory qualitative study. To collect data during May and June of 2009, I facilitated and audio-recorded focus groups with students with and without ID, teachers and EAs, and conducted an interview with a school administrator. Data from the student focus groups were also recorded graphically by a graphic facilitator.

Student focus groups provided perspectives on their opportunities to make decisions during the hours they were at school including (a) less structured times of the school day (e.g., upon arrival, after last class, lunch hour), (b) class time, (c) participation in co-curricular or extra-curricular activities, (d) participation in special events, and (e) participation in course selection or decisions around program of studies, IEP goals, and work experience placements.

The graphic record and relevant analyzed data from the student focus groups were shared with members of the teacher and EA focus groups, and with the school administrator during the interview. They were asked to comment on the similarities and differences in opportunities for decision making reported by students with and without ID, and to explore possible reasons for the similarities and differences.

Recorded data were transcribed and coded. I then conducted within-case and cross-case analyses, as I looked for patterns, similarities, and differences in responses to questions from the perspectives of the different focus groups and the interview participant. The sorting function of an Excel spreadsheet was used as a tool to support analysis of the data.

Findings

The analyses of the student and staff data resulted in the identification of three main themes: structure of the system, role of adults, and safety. All three can facilitate or limit opportunities students with and without ID have to make decisions. The first two of these themes are explored in the findings and discussion sections of this report.

Structure of the System

The two identified structural limitations were transportation to and from school and the high school credit system. These affected students with and without ID quite differently.

Transportation

Students without ID experienced more decision-making opportunities immediately before and after school than students with ID. The students without ID had choices about how to get to and from school (e.g., taking a transit bus, walking, skateboarding, or getting a ride). These options allowed them flexibility around what time to arrive at school in the morning and what time to leave at the end of the day, permitting them to make real decisions independently, and to spend before- and after-school time building social connections with peers.

Most of the students with ID travelled to and from school by school bus or with a parent/guardian, and most were “handed from adult to adult.” This eliminated the informal opportunities for decision making and socializing enjoyed by the students without ID.

High School Credit System

The high school credit system was perceived as having an impact on decision-making opportunities for students related to (a) class-time activities, (b) assignments, and (c) course selection.

Impact of Credit System on Student Decision Making During Class Time

It was clear that the teacher was perceived to make the decisions related to what went on in the classroom. Students had some limited opportunities to make decisions such as voting on what game to play during a physical education class, or deciding which jobs to do during a foods and nutrition class. The teachers wondered aloud why they did not offer more opportunities for students to make decisions during class time. The limited choices offered were often not “real choices” (e.g., doing this assignment or not passing a course). Some subject areas lent themselves to more decision-making opportunities than others. However, some teachers provided more decision-making opportunities by nature of their teaching style, regardless of the subject they were teaching. Both groups of students perceived that they had few decision-making opportunities related to what happens in the classroom other than whether or not to participate and whether or not to attend.

Even these were not perceived as choices by many students for a variety of reasons, including incongruence with a student’s personal goals or not wanting to disappoint parents or teachers. One student summed it up by saying, “I don’t really see it as choice. I file it as best strategy.” These students have already made the decision to participate in their schooling. Other students make the choice to not participate or to not attend and are willing to suffer the consequences.

Impact of Credit System on Student Decision Making on Assignments

Teachers reported that they offered less flexibility and fewer opportunities for decision making around assignments and projects for students without ID because of the need for them to meet the criteria for obtaining credit for their courses. For students with ID, teachers said they tended to offer a wider range of options, and were even willing to negotiate assignments based on student requests. Teachers explained that students could receive a modified (M) course designation, and therefore did not have to meet the same criteria for obtaining credit. In Manitoba, “modified” means that teachers can change the number or content of the learning outcomes that a student with ID is expected to achieve (Manitoba Education, Citizenship and Youth, 2006, Glossary, p. 27). Teachers also used choices and flexibility in assignments to motivate students considered to be “at risk,” in spite of the fact that these students were not eligible for “M” designated courses. Once again, teachers wondered aloud why they did not offer more decision-making opportunities to all students. They acknowledged that students often performed better on assignments where they had more options. Meanwhile, other students struggled to make decisions when they were offered choices, and would have benefitted from more experience making such decisions.

Impact of Credit System on Student Course Selection

Educators reported that students without ID had to obtain a minimum number of credits in order to graduate. Many had to meet certain requirements in order to enter their chosen post-secondary education programs. These factors limited their course options. Students who did not have a clear career path had their choices limited by the perceived need to “keep their options open” and tended to take the most challenging courses. Parents had a significant influence on course selection for most students without ID.

In contrast, it seemed to be assumed that students with ID were not going on to post-secondary education and therefore did not need to be concerned about meeting entrance criteria. In addition, they had the option of staying in school until they were 21, which allowed them more time to participate in their preferred options and to obtain credits. As a result, students with ID had the option of incorporating recreation and leisure activities into their school day such as going to the weight room or playing Ping-Pong. In addition, work experience opportunities were also available to the students with ID in order to obtain their credits. This additional flexibility resulted in a different school experience for the students with ID than that of the students without ID.

Participants perceived a stronger connection between high school courses and post-school plans for students without ID than for those with ID, particularly those students without ID planning to pursue post-secondary education. An exception to this might be work experience, when treated as course credit and connected to the post-school goals of a student with ID. However, one student with ID complained

vehemently about having to go to work experience in a place that did not match her interests. In my experience, matching work experience placements with the interests and goals of students is extremely challenging due to the limited availability of such placements and the fact that schools, school divisions, and adult service agencies sometimes compete for them. Therefore, it is not uncommon for students to be placed in work experience placements that are not related to their interests or goals, once again weakening the connection between the high school experience and the post-school goals and dreams of students with ID.

Role of Adults

The support of student services teachers and EAs was reported to increase flexibility and decision-making opportunities for students with ID and students considered “at risk” in several ways: (a) by giving more freedom to enter or leave the classroom for breaks as needed, or to follow a personalized schedule based on individual needs; (b) by allowing for assignments and projects to be negotiated according to the specific strengths, interests, and needs of a student; (c) by expanding the opportunities for students with ID to participate in a co-curricular activity (e.g., this was sometimes facilitated by adjusting the hours of an EA to provide necessary support outside of regular school hours); and (d) by encouraging and facilitating the attendance of students with ID at school-wide special events such as pep rallies and fundraising events.

While exploring the role of adults, a clear difference between students with and without ID emerged related to friendships, and the role that adults played in this area of the students’ lives. Students without ID had more opportunities during less structured times to make decisions, and these decisions were frequently related to interactions with friends who were peers. Friends were rarely mentioned by the students with ID. The EAs observed that when the students with ID were together as a group, they did not appear to have conversations on common topics but instead each talked about their own individual interests. Further, it was perceived that the students with ID did not appear to have friends in the same way as those without ID. There was no discussion, however, around what role they or other adults could play in facilitating such conversations and teaching appropriate friendship skills. It was obvious during the student focus groups that the students with ID treated some of the EAs as if they were their friends. This was not surprising, given that the students with ID spent a lot of their unstructured time with the EAs.

Discussion

There is much agreement in the literature regarding the steps involved in decision making as follows:

1. An internal or environmental cue occurs that sets in motion the process of goal setting.
2. A generation phase takes place where options are generated.
3. An evaluation phase takes place where the individual examines pros and cons and rates options.
4. An implementation and learning phase takes place where the selected option is implemented, and the individual observes whether or not implementation helped to reach the goal and makes note of this in memory.

In order to become increasingly competent, self-regulated decision makers, we need multiple experiences with both positive and negative consequences of our decisions. The negative consequences should be mediated by receiving guidance from those who are more self-regulated in their decision-making capacity (Byrnes, 1998). It is the responsibility of the person(s) providing the guidance to gradually transfer more and more decision-making responsibility as those in their charge demonstrate increased self-regulation. This does not mean waiting until every decision is a successful decision, since even the most self-regulated decision maker makes poor decisions at times. Regardless of individual starting points, the focus should be on providing adequate opportunities to practise so that every individual can become as self-determined as possible (Wehmeyer & Schwartz, 1998).

It would be beneficial for school staff, students with ID, and their parents to have a basic understanding of what is needed in order for individuals to become more successful decision makers. They also need to understand the importance of developing these skills, given the expectation set out in the VPA. When individuals turn 18 years old, vulnerable persons are presumed to have the capacity to make decisions that affect themselves and should be encouraged to make their own decisions independently, or with the assistance of their support network.

This understanding may assist school teams and parents of students with ID to examine certain practices more critically. For example, they may examine the practice of having most students with ID transported by school bus and transferred from adult to adult. They may consider the potential benefits of offering certain students with ID the same choices regarding travelling to and from school as are enjoyed by students without ID (e.g., more opportunities to practice decision making, more opportunities to socialize). If this is not reasonable, perhaps a student with ID could enjoy a few minutes with peers, without an adult, before going to class. This information may also assist in the examination of the balance between increased supervision of students with ID during lunch hour or other less structured times (as compared to students without ID) and the resulting reduced opportunities to develop and nurture friendships with peers. Teenagers without

ID generally practise friendship skills outside the direct supervision of adults. My observation that the students with ID appeared to perceive the EAs (who are paid to be with them) in a friendship role is in keeping with the research done by Giangreco, Yuan, McKenzie, Cameron, and Fialka (2005) and Giangreco and Doyle (2007). They reported inadvertent detrimental effects of unnecessary EA proximity, which included interference with peer interactions and insular relationships.

Given appropriate support and information from those who supervise them, perhaps EAs could move out of the supervisor/friend role, and help to facilitate decision making around interactions with peers. They could assist students in understanding the potential consequences associated with certain ways of treating others. If teachers were teaching decision-making or problem-solving steps or processes, EAs could help to reinforce that information. EAs could also help provide the scaffolding that students with ID would need in order to improve their decision-making competencies.

My findings showed that the structure of the school system was perceived to put some limits on decision-making opportunities in schools. However, decision-making opportunities in classrooms varied according to individual teaching styles, even when two teachers were teaching the same course. Teachers negotiated assignments and projects with some students in order to meet their specific needs. These findings suggest that a teacher can have at least as much of an impact on decision-making opportunities in the classroom as does the structure of the school system. In fact, Manitoba Education supports teachers in “listening to ‘student voices’ in classrooms and schools and providing choices in how students demonstrate their understanding” (Manitoba Education, Citizenship and Youth, 2007). The question of how teachers in Manitoba decide how much flexibility they will offer to which students has potential for future study.

Another structural difference identified was that students with ID could stay in school until they were 21, therefore they had more time in their schedules for recreation and leisure options during the school day. In actuality, according to Part XIV: School Attendance, section 259(1), of *The Public Schools Act* (Manitoba, 1997), all students have the right to attend school until the last school day of June in the calendar year in which they turn 21 years of age, not only students with ID. Given this, why is it that only the students with ID stay until that age? If a student without ID chooses to stay past the age of 18, it is generally because they are working toward gaining credits that they missed in the past or upgrading marks in order to meet entry requirements for a post-secondary program. They are not seeking optional recreation or leisure courses. How much are students with ID benefiting from remaining in school beyond the time that their same-age peers graduate? How can the link between high school and post-school be strengthened for students with ID? Based on the data from my study, student services teachers and EAs helped facilitate decision-making opportunities around student assignments and projects, as well as attendance and/or participation in activities during less structured times in the school day. Perhaps these adults could play a more extensive role in helping students

build skills in decision making and self-advocacy, and helping strengthen the link between school and post-school. A better understanding of this potential role is required by the EAs and, more importantly, by those who supervise or direct them.

Conclusion

Students that have limited opportunities to practise making decisions are less likely to grow in their decision-making competence. Therefore, they continue to be perceived by adults as lacking competence for making effective decisions.

We all have a role to play in breaking this cycle. The teachers in my study wondered why they themselves did not offer more decision-making opportunities to their students. This indicates the realization that they have that ability. The EAs indicated a willingness to support the teachers, and it was reported that student services teachers and EAs already did facilitate and support decision-making opportunities for students. Administrators can support teachers and EAs by offering decision-making opportunities to school staff and encouraging them to encourage more decision making by students, within the context of “calculated risk.” Parents/guardians and students can participate with school teams in exploring ways to increase opportunities at school and at home, for young people with and without ID to become increasingly competent, self-regulated decision makers. According to Powers et al. (1996), “few experiences are more empowering than communicating respect and trust for someone’s decision-making skills” (p. 263).

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UNSEEN THREADS: WEAVING THE STORIES BETWEEN TEACHER BELIEFS AND CLASSROOM PRACTICE⁵ BY SHEENA BRAUN AND CHARLOTTE ENNS⁶

Introduction

This qualitative research study examines the relationship between three teacher participants' beliefs and their classroom practices as it relates to the ongoing implementation of inclusive education and the implementation of the regulations introduced in *The Public Schools Amendment Act (Appropriate Educational Programming)* (Manitoba, 2004). Semi-structured interviews provide personal narratives of beliefs about learning, inclusion, and disability. Classroom observations provide an opportunity to examine the influence on practice. Additionally, the study determines if self-described beliefs match observed classroom actions.

The purpose of this study was to look at the complex interplay between teacher beliefs and behaviours as they relate to inclusive education. Exploring teacher beliefs about disabilities and perceptions about inclusive education can help to determine how differences in beliefs affect differences in instructional practices. The literature suggests that there is often an incongruence between the beliefs of individual teachers and their classroom behaviours (Jordan 2007, Sikesa, Lawson & Parkerb, 2007). The focus of this study was to examine the worlds of general classroom teachers and determine if there were gaps among provincial inclusionary policies, school organizational structures, and teacher classroom practices. Many factors may influence the implementation of inclusion; however, the intent of this study was to focus on the work of classroom teachers and their narratives in order to describe how they make sense of inclusion policy. Departing from previous research done in this area, the study did not rely on self-reported data alone but included observations of actual teacher classroom practices and explored the relationship between these practices and the teachers' described beliefs.

⁵ Braun, Sheena. (September 13 2011). *Unseen threads: Weaving the stories between teacher beliefs and classroom practice*. University of Manitoba M.Ed. thesis <http://hdl.handle.net/1993/4912>

⁶ Sheena Braun is a school principal and Charlotte Enns was her major advisor during her Master's program.

Although numerous concepts emerge in the examination, several key definitions both pedagogical and practical should be noted.

The term **inclusion** in the study's approach refers to a philosophy or belief system in which all individuals are valued and belong. It is not about a location or placement but rather refers to values that promote social interaction, friendship, and participation (Proactive Information Services, 2006). Additionally important to this study are the recognized **instructional practices** that support the principles of inclusive education (Villa & Thousand, 1995). The study's observation focuses on principles of constructivist learning, the use of flexible classroom groupings, the nature of teacher/student interactions, and the use of high quality strategies as described by Kame'enui and Carnine (1998).

Concepts and ideas of **disability** were also defined. This study presented disability from two opposing viewpoints—one that interprets disability as pathology, and the other that assumes an interventionist description. People who hold pathology beliefs view disability as an internal problem that will not be responsive to change (Jordan, Glenn & McGhie-Richmond, 2008, p. 79). At the other extreme, individuals with interventionist views believe that it is their responsibility to reduce barriers and create access for the disabled.

Finally, the term **belief** as used in this work relates to a set of assumptions used by people in everyday practices (Jordan, 2007). These assumptions produce a personal acceptance or a belief regardless of theoretical correctness. Within this research, teacher beliefs refer to the perceptions and judgments that teachers hold with regard to disability, learning, and inclusion. Additionally, differences in beliefs are linked to how teachers differ in the following areas: (a) willingness to take responsibility, (b) efficacy, (c) philosophy, and (d) instructional practice.

The definitions create an infrastructure for the methodology, provide some parameters, and offer an understanding of the researcher's intended meaning.

Method

The qualitative research design of this study involved the implementation of two different methods for gathering data, an interview and an observation instrument. Data were collected during a one-month period (May 2009), using three teacher participants in a repeated interview format, and conducting a structured observation in each teacher's classroom. The three teacher participants were all female, had over ten years teaching experience each, and taught in elementary classrooms (Grade 1, Grade 2, combined Grades 5/6) in urban schools. Essential to the study were the similarities that connected the two instruments. Both methods assisted in examining the following three issues: (a) what the three teachers believe about disability, learning, and inclusion; (b) how these beliefs affect their practice; and (c) whether their beliefs are congruent with their practice.

The interview focused on stated teacher actions in relation to the observation, which was an opportunity to view the actions in context. The overlap provided the needed information to further examine the congruency between stated beliefs and classroom actions. The need to delimit the parameters of the study in order to make it manageable also contributed to its limitations. The one-time classroom observation period was one such factor. Ideally, multiple visits and prolonged periods in the classroom setting would be best. Additionally, the small participant sample (three teachers) restricts the generalization of findings, although it did allow for a depth of understanding regarding participant views and practices. The nature of observational data in general can be a limitation because it is influenced by what individual observers choose to make their primary focus. For this reason, clear guidelines regarding instructional practices and classroom interactions that promote inclusion were established for classroom observations. As the participants were volunteers and were aware that the study was about inclusive educational beliefs and practices, there was the potential to recruit only participants with strong pro-inclusionary tendencies. What the findings revealed, however, was the complexity of the issues and that teachers who perceive themselves as inclusive may not implement practices that support such beliefs.

Summary of Findings

The results from conducting classroom observations followed by individual semi-structured interviews with each teacher were summarized according to the three focus points of the study.

What Are Teacher Participants' Beliefs about Disability, Learning, and Inclusion?

All three teachers in this study were inconsistent within their interview responses when discussing disabilities. At times their comments indicated that they framed disability as pathology and other comments indicated an opposing view consistent with characteristics of the human rights perspective. These discrepancies regarding descriptions of disability created a variation that later was interpreted as a predominant way of thinking. Findings suggest that, although teachers do not subscribe to one model, they may have a core way of typically viewing disability. This range of thinking about disability is also seen in the research (Jordan, Glen, & McGhie-Richmond, 2008). Kugelmass (2001) suggests that if the teacher's predominant model of disability comes from a deficit basis, the inclusion of children with learning challenges, disabilities, and other impairments into a regular education classroom will be difficult. In this study, Teacher A predominantly viewed disability from an interventionist perspective. Teacher B's comments indicated a strong alignment with beliefs that disability is a pathology. Some of her comments began with an inclusive approach, but quickly the narrative turned to pathology. Teacher C vacillated between the two although her responses were more frequently from an interventionist perspective.

Beliefs about learning were harder to discern from the teacher participants. Findings suggest that only two of the three teachers spoke about learning with any frequency. When discussed, Teacher A and Teacher C did talk about learning in terms of intentionality. Key words such as “meeting needs,” “metacognition,” “meaningful,” and “connectedness” were used. As indicated in the literature, these phrases are key principles of inclusive education. Teacher A and Teacher C strived to make the learning relevant to their students. This was demonstrated in the high percentage of quality strategies they used.

Research indicates that a constructivist model of inclusive education embraces these tenets of learning as well. McLeskey and Waldron (2000) suggest that inclusive education is a meaning-making process, where the learner makes connections and creates new cognitive structures. As indicated above, this description parallels the thoughts of Teachers A and C. Again, however, noticeable inconsistencies clouded any clear-cut understandings. These overlaps were frequent and similar in content. They included responses that enmeshed learning with inclusion, participation, paraprofessionals, and resource support. What this study’s findings did indicate was that learning was not a stand-alone item but rather one that was spoken of in terms of its relationship with other factors.

Interview responses indicated all three teachers had differing degrees of commitment to inclusion. All three teachers articulated a commitment to cutting-edge instruction, diversity, and the inclusion of children with special needs. Teacher A met criteria that would suggest a high degree of commitment to inclusion. Teacher B would be described as less committed and fall at the opposite end of the commitment continuum, while Teacher C would be placed somewhere in the middle. Observations supported these variances in commitment. For example, Teacher A conducted planning with resource/special education that is carried over into the classroom. At times she initiated and implemented planning for students with special needs herself. Additionally she felt that she had a better understanding of her students and did not require all the suggestions from outside services. Teacher B talked about what she needed to do and there was evidence of accommodations for students with special needs in her classroom; however, she indicated that she spends a great deal of energy and time at odds with the school’s resource department.

Although all three participants appeared to support an inclusive philosophy, they also described a high degree of concern and confusion surrounding the concept. Questions around responsibility, tensions between system rhetoric and reality, as well as pressures with accountability fuelled mistrust and hindered a complete acceptance of inclusion.

How Do Teacher Participants' Beliefs Affect Practice?

Teacher beliefs are of paramount significance in shaping the inclusion experience in their classroom. Beliefs move understanding from a surface level to a more purposeful, planned instruction that is mindful of the “why” of the teaching behaviour (Zollers, Ramanathan, & Yu, 1999). Additionally, findings in the Zollers et al. study indicate that teacher beliefs about inclusion are ambiguous and this uncertainty causes numerous difficulties with implementation. All three narratives pointed to individual experiences that had developed the teachers' personal understandings of inclusion. Both the interview and the observation described contradictions and features that supported the confusion. As Avramidis and Norwich (2002) note, this vagueness translates into practice, and becomes a “bewildering concept that can have a variety of interpretations and applications” (p. 158).

Unfortunately, this doubt additionally affected teacher efficacy and created individual uncertainties about their skills and effectiveness. This reservation regarding abilities was identified in interview statements from all three teachers. Although Teacher B and Teacher C were more vocal with their concerns, Teacher A's comments acknowledged this fear as well. For example, Teacher A commented,

Fortunately his grade one paraprofessional came with him in the beginning and she had a lot more knowledge of him than I did. I realized that she was the one that knew him and I didn't and I had things to learn about what made this kid work.

Efficacy was both explicitly stated and implied. In every case it was possible to make an interpretation that pointed to a tension between the system and individual experiences of inclusion. This tension has also been noted in the literature (Sikesa, Lawson & Parkerb, 2007). The expression of concerns regarding efficacy and uncertainty of skills were frequently followed by statements of blame. These blame statements offered more evidence to support the complexity of the concept and the tensions. Comments related to ineffective and limited classroom supports, infrequent interventions by the resource teacher, and uncooperative families usually shifted the responsibility from the classroom teacher to others who were seen as more expert. In all three narratives, resource personnel were deemed the experts and were the source of any unsuccessful and ineffective practice. Teacher A indicated more confidence in her abilities and spoke less of frustrations. Teacher B indicated concern about her skill level but had intentionally abstained from additional professional development. She talked a great deal about her dissatisfaction with the system and its lack of support. Teacher C wavered between statements of confidence and worries about skills. She spoke in great detail about her concerns with the system and service delivery.

Efficacy as described in the interviews linked closely with classroom observations. Teacher A saw herself as efficacious. In her practice there was minimal pull-out and she had a high degree of interaction with all students. Teacher B viewed resource as the expert and felt that she did not receive enough support. Pull-out was frequent and was the way that programming was delivered. The paraprofessional in her classroom had the majority of interactions with students with special needs and Teacher B's students were minimally engaged. Teacher C was unsure and wavered between being capable and blaming the supports.

Are Teacher Participants' Beliefs Congruent with Teaching Practice?

In all three participants there existed a link between their beliefs and their classroom practice. Although the degree of commitment to inclusive practice varied between individual teachers, there was a discernable link between observations and personal interviews. Teacher A's interview indicated that she had a high degree of commitment to inclusion and her practice exemplified high quality instruction with frequent positive student interaction patterns. With Teachers B and C, however, the link was more complex. Teacher B's interview indicated less commitment and increased tension. This was reflective of her classroom practice and paralleled research by Sikesa, et al. (2007) who found that policy and reality were tenuously, if at all, linked. Teacher C's practice indicated a high degree of inclusive commitment; however, her interview indicated some hostility and anger at the system. Nevertheless, in practice, Teacher C exhibited a general congruency between beliefs and practice, which was not damaged by her irritation and annoyance with service delivery concerns.

In this study, teachers' accounts were unique and personal. Each reflected complexities, dilemmas, and constraints, as well as possibilities. Accounts focused on the human and practical aspects of day-to-day involvement with individual pupils and the system in which each teacher worked. Observations demonstrated congruence; however, the link was complex and required a deeper understanding of individual teacher experiences, emotions, and context.

Kulgelmass (2001) suggests that when one triangulates stated values and beliefs with those embedded in conversations and observed interactions, one begins to gain insights into a more implicit way that beliefs operate. This study used this suggested research methodology to unmask patterns that indicated the profound influence of the interpersonal and intrapersonal values that affect actions.

Conclusions

This study set out to examine the relationship between three teachers' beliefs about learning, disability, and inclusion, and their classroom practice. Although the study's findings resemble the inconsistency and confusion surrounding inclusive education that other researchers have collected (Proactive Information Services, 2006), four prominent areas of resonance were identified, including

- the varying degree of commitment that each participant had towards creating an inclusive environment
- the frequent overlaps in interview comments related to responsibility and efficacy
- the relationship between the richness of interview descriptions and the participants' feelings of efficacy
- the amount of frustration and tension relative to the participants' commitment to inclusion

Degree of Commitment

It is not surprising that conflicting orientations toward school inclusion emerged in this study. Jordan (2007) describes a continuum of beliefs about disability where perspectives based on pathology and ones based on interventionist principles lay end to end. She further suggests that confusions stem from the differences in beliefs that mark each end of the continuum. The current findings suggest that in addition to Jordan's continuum of perspectives on disability there is a spectrum of teachers' commitment to inclusion. Whereas the disability continuum uses the characteristics of each of the disability models, the commitment scale used teacher efficacy and responsibility to plot the teacher's degree of commitment.

Characteristics used to describe efficacy in this study included broad areas such as professional growth, knowledge, professional development activities, additional training, and course work. The teacher participants' predominant model of disability and their talk about learning were also used. This study's proposed spectrum would determine a range from high to low commitment based on the frequency of the descriptors in the interview conversation. Based on this methodology Teacher A would sit at one end of the spectrum (high responsibility), Teacher B would be at the opposite end (low responsibility), and Teacher C would be mid-range. This range of commitment is significant because it helps put order to the confusion and attempts to make beliefs and values clearer.

Overlaps in Efficacy and Responsibility in Interview Statements

Irrespective of individual differences, there was often an overlap of statements that were identified as efficacious or responsible. When teacher participants felt less effective and skilled, there were fewer overlaps and a significant number of negative efficacious/responsibility statements regarding inclusive practice. When teacher participants did not feel efficacious, there was also an increase in the number of contradictions in the interview comments. For example, Teacher B indicated that she was okay with having a student with special needs in her room. Then she indicated that most days when the paraprofessional comes in, she pulls him out of her room to do work on his IEP goals. Additionally, she indicated that she does not participate in professional development but yet she states that she just learns along the way.

Richness of Interview Descriptions and Responses

All narratives in this study provided thorough accounts of each teacher participant's work with students with special needs. However, each interview varied in length and richness of detail. This study found that the teacher participants who felt more confident and responsible provided extensive, rich, detailed interview explanations. They offered accounts of not just what students were doing but also why they had them doing it. For example, Teacher A provided several detailed accounts of professional learning and why she felt they were important to her students.

Debbie Miller talks about teaching with intention and that is what I am working on—slowing down and doing fewer things but doing them way better.
Regie Routman talks about inspiring students and getting them really engaged in reading. I am trying to do that as well.

This move beyond the surface level helped to identify additional beliefs about inclusion that were held by these teachers.

Tension and Frustration

All teacher participants expressed a degree of frustration in their attempts to put into practice an inclusive philosophy. These frustrations could be categorized into informal clusters of high, medium, or low. Although frequency played a major role in the groupings, use of words and intensity of feelings were also considered.

This study found that the higher the degree of frustration, the less commitment to inclusion and the less evidence in practice. Teacher B and Teacher C stated frequently in the interview their displeasure with their schools' supports, the amount of paraprofessional time they received, and their exclusion from the child's team. They used words like ammunition, tokenism, and education lottery. Conversely, Teacher A's interview was considerably more positive. It appeared that the lower the frustration, the more inclusive the teacher's practice.

Theoretically, this study presents a framework for a deeper understanding of individual teacher beliefs and experiences as they pertain to teaching children with disabilities. Additionally, this research highlights the important dynamics of the individual relationships between stated beliefs, implied beliefs, and classroom practice with three classroom teachers. It was never the intent of this qualitative study to generate findings that could be applied to all teachers in all school settings. However, the findings confirm to some extent the results of previous literature. This includes the notion that competence and attitude are linked, that Manitoba shares issues with the broader educational context, and that teachers need more than policy to guide them to change their practice.

There are also several specific considerations worthy of note. Unfortunately, these suggestions are not new, but we can hope that continued research in inclusive education will eventually transform these obstacles into possibilities that will bring about change.

Communication and Responsibility

The findings suggest that the roles and responsibilities of classroom and resource teachers need to be clarified, as they are murky and inconsistent at best. Schools need to move past inclusive jargon and implement a structure that facilitates extensive, ongoing, and meaningful communication. Through this communication, school personnel will realize that each one of them is responsible for the instruction of all students.

Although making adjustments for students with special needs has traditionally been the primary responsibility of the resource teacher, in a collaborative inclusive environment, planning, assessing, and implementing should be a joint venture (Hoover & Patton, 1997 in Smith & Leonard, 2005). Communication must be a consistent part of the teaching schedule and include discussions related to all aspects of teaching and learning. In addition, classroom teachers need to have input into decision making, and they need resources to enable their decisions to be put into practice.

Paraprofessionals

This study's findings suggest that the use of paraprofessionals should be examined more closely. Teacher participants indicated that paraprofessionals need to be better trained. This may involve a more school-wide approach to paraprofessional training. Building capacity through more knowledge and skills is important; however, before this can have an impact, the school division needs to develop a more stable approach to paraprofessional placements. As indicated by all participants, the frequent turnover and change of paraprofessionals during the course of a school year is detrimental to students and teachers alike. Additionally, the type of paraprofessional supports for individual children needs to be clarified. Jordan (2007)

indicates that the role of the paraprofessional and the expectations of the teacher for the role need to be understood and agreed upon by all parties.

Teacher Skill Level

Regardless of outside perceptions, increasing the skills of individual teachers and their confidence in those skills will bring about change in attitudes and practice. School systems need to cull and develop classroom teachers' skills in the principles and strategies that matter most. Overload and fragmentation can no longer be part of what happens in the school (Fullan, 1999), and teaching cannot continue to be a private matter hidden behind the classroom door. John Hattie (2009), in his book *Visible Learning*, suggests that effective teaching and learning are not hidden. He urges educators to use the research that exists and focus their energy on what matters. His appendix rank orders the most effective strategies and the degree of impact they will have on the learner. Skills need to be developed with this in mind.

According to the literature, the primary reasons for limited commitment to inclusion were inadequate teacher skills and preparation (Snyder, 1999; Winter, 2006), and poor leadership (McLeskey & Waldron, 2000). The findings from the current study support this work and reflect similar reasons for resistance towards inclusionary practice.

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DEFINING EFFECTIVE AND FUNCTIONAL SCHOOL DIVISION PLANNING PRACTICES⁷ BY LESLEY EBLIE TRUDEL⁸

Context and Purpose

This section summarizes a research study designed to determine whether there were systemic features of school division planning that would result in improved linkages between intentions and related actions, making the process more effective and functional for educators. In a review of literature on the topic, I found that there were common threads suggesting various approaches to strengthen planning practices, improve organizational learning, and enhance the change process. I categorized the suggested approaches from the literature into a conceptual framework and engaged in a series of interviews with school division participants, transcribing and analyzing the data according to the conceptual framework. Through this process, I discovered that the perspectives of participants were similar or related to the information from the literature on planning for change. While participants added new ideas that were not originally considered in the literature reviewed, the ideas or variations expressed did not alter the spirit or intention of the original framework derived from the literature. When synthesizing the case study data, I was also able to create a new framework to consolidate the archetypes of planning at the school division level, particularly in the context of educating students with challenging learning behaviours. The results of this study clearly demonstrated that there were key features of school division planning, identified both in the literature and from the perspectives of educators from participating school divisions, that would serve to improve linkages between strategic educational intentions and related actions. This information has relevant implications for educators in helping to set the stage for organizational improvement and change.

In recent years, educators in many jurisdictions have received a mandate for large-scale, sustainable, organizational reform. Changes have taken place that resulted in pressure on those in public services, particularly education, to cope with fundamental shifts in political, economic, social, and cultural climate. McEwan (1995) emphasized that, as Canadians confront the knowledge of societal changes over time, questions and concerns about educational inadequacy and inaction have contributed to a collective anxiety about the nature of our schools. Is the education system preparing students for productive lives? Are all students receiving the education that will help them thrive as equal and contributing members of society?

⁷ Eblie Trudel, Lesley Goodhand. (September 22 2010). *From knowledge to action: Defining effective and functional school division planning practices to maximize organizational improvement and change*. University of Manitoba Ph.D. dissertation. <http://hdl.handle.net/1993/4220>

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In May 2009, I embarked on a study to address questions of this nature. I researched the topic of planning, a process endorsed by educators across Canada, to address concerns about educational improvement and accountability. I cited examples from the literature on how provincial departments of education across Canada have translated the need for accountability into pragmatic models, cycles, and frameworks for planning to guide school improvement. I noted that organizational structures such as school division plans were examples of accountability mechanisms established to monitor the work in education. Through this qualitative study, I attempted to determine whether education planning could provide the desired accountability mechanism to move educators from knowledge to action and generate the organizational learning and change necessary to face the future. In particular, my focus was on the planning processes of school divisions in the province of Manitoba.

While the practice of education planning in Manitoba (Manitoba Education, Citizenship and Youth, 2004) was reportedly intended to increase efficiency and enhance communication, thereby improving educational outcomes for all students, I cited challenges to the proposed efficacy. I revealed that school organizations typically rely more on faith and trust than on coordination and control to achieve desired intentions toward school improvement (March & Olsen, 1976; Weick, 1976). I highlighted the fact that structural mechanisms such as plans are sometimes viewed as superficial rather than effective or functional, and they may be completed only when required. Meyer and Rowan (1977) asserted that the education planning process might simply exist as a bureaucratic requirement, rather than being an authentic, value-added process that links intention to action. As a result, I raised several questions in order to further explore this dilemma:

- What are the characteristics of planning acknowledged in the literature that link organizational intention with action, dispelling the myth of the plan as a bureaucratic requirement?
- According to the perspectives of key individuals in participating school divisions, how do planning practices relate to, or differ from, the examples cited in the literature?
- Are there planning practices of the school divisions participating in this study that are effective and functional, and that will serve to construct a framework for reference when planning for organizational improvement and change?

In order to address the preceding questions, I centred on one concrete aspect of school division planning, namely the process of setting divisional outcomes for students with challenging learning behaviours. By defining one aspect of planning, participants were able to offer perspectives on their practices within a familiar and identified context. I acknowledged that, through the interview process, school division personnel might refer to a continuum of student learning that affects student behaviour. This could range from references to academics in general and improvement of student achievement to specific programming aimed at increasing literacy levels and enhancing social-emotional learning.

Data Collection and Analysis

The data collection and analysis of this study took place in three phases. In the first phase, I identified potential school divisions for the study sample by reviewing the planning templates of jurisdictions that included systemic outcomes for students with challenging learning behaviours. While fifteen Manitoba school divisions were invited to participate in the study, six responded favourably and agreed to engage in individual interviews regarding their planning practices. The second phase of the study involved individual interviews with selected personnel in school divisions. Participants in the interview process in each school division included the superintendent/CEO (or designate), the student services administrator, and one other person considered key to planning for students with challenging behaviour. Interview participants were free to respond to the interview questions and to supplement the structured questions with ideas and additional documentation. The third phase of the research involved the development of case studies based on the interviews in each school division. Information gained from the interview process was categorized in each case study according to a conceptual framework (Reichel & Ramey, 1987; Guba & Lincoln, 1989) derived from the review of literature. As a grounded researcher, I used sensitizing concepts (Blumer, 1969; Van den Hoonaard, 1997) from the literature to create the framework for analysis of the data. With an inductive approach, I organized the data and identified patterns and relationships according to five concise themes: context, capacity, climate, structure, and strategy. A process of analytic abduction (Charmaz, 2006) was used to synthesize the data from the case studies, identifying both similarities and differences in planning practices identified by school division participants.

The challenge in education acknowledged in this study illustrated that the practice of strategic planning in education has had a questionable impact on accountability and improvement of student learning. As a result, I posed the first question as to whether there were characteristics of planning in the literature that could link organizational intention with action, dispelling the myth of the education plan as a bureaucratic requirement or function. In response to this question, I found that there were common threads that ran through the literature suggesting various approaches to strengthen planning practices, improve organizational learning, and enhance the change process. I organized the suggested approaches from the literature according to the five categories of the conceptual framework.

In the category of *Context*, I referenced details surrounding the circumstances or events in organizations where planning normally occurs. Notably, Owens (1998) identified that change could be actively approached through teaming or in social groups. Caplow (1983) indicated that planning was generally more successful when delegated to individuals or groups. He added that organizations should focus on details or contingencies in case of unexpected stress or events occurring in their environments.

In the category of *Capacity*, I focused on details from the literature regarding the capability of staff to perform or produce. Elmore (2004) and Kanter (2004) indicated that capacity with planning was most effective if personnel involved were able to collaborate. Fullan (2006), Dent and Goldberg (1999), Kanter (2004), and Kleiner (2003) identified that collaboration would be most successful if people felt that they belonged and had a deep sense of commitment to their organizations.

In the category of *Climate*, I discussed aspects from the literature on the prevailing conditions and attitudes toward planning for change. Specifically, Elmore (2004) and Fullan (2006) acknowledged that an emphasis on collaboration and open communication would achieve a balance between bureaucratic planning structures such as formats or templates and the loosely coupled nature of school organizations. Pfeffer and Sutton (2000) highlighted that low levels of fear and high trust would have positive effects on productivity. Deutsche (1973), Fullan (2006), Owens (1998), and Pondy (1967) noted that, although conflict was a common and legitimate occurrence in organizations, it could actually strengthen the organization if managed properly. Isaksen, Schryver, Dorval, McCluskey, and Treffinger (2000) revealed that leadership, creativity, and planning would depend largely on the tone of the organizational climate, and McCluskey (2008) affirmed that appropriate tone in an organization could ultimately determine the success or failure of a plan.

In the category of *Structure* I referenced the literature on the discrete parts of the organization involved in planning. Elmore (2004), Kouzes and Posner (2003), Reeves (2006), and Schmoker (2004) emphasized the importance of being current and relevant when engaging in a plan, as well as having fewer, more concise, and coherent goals. Miliband (2004) and Schmoker (2004) also suggested that effective planning involves measurable statements rather than indications of commitments or activities.

In the final category of *Strategy*, I referred to perspectives in the literature involving the plan to achieve particular goals or outcomes. Senge (2000) and Schmoker (2004) acknowledged the importance of planning in active groups with opportunities for input, rather than passively implementing plans designed by others. Argyris (1978), Mintzberg (1996), Pascale (1996a), and Schon (1983) emphasized how groups could set goals, then monitor, reflect on, adapt, and learn from their experiences in planning. Accordingly, Metcalf (1981) and Weick and Westley (1999) noted that smaller, incremental changes were preferred to large-scale, disruptive shifts in organizational agendas.

After summarizing the literature pertaining to planning for change, I acknowledged that, in actual practice, school divisions would not possess the ideal conceptual elements described that would assist in dispelling the myth of planning bureaucracy. I found, however, that if planning was approached in a manner similar to that suggested in the literature, indications were that there would be a greater link between organizational intention and active, more authentic (less bureaucratic) planning experiences.

In the second question raised in the study, I attempted to determine how the perspectives on planning practices held by key individuals in school divisions either related to or varied from the examples cited in the literature and summarized in the conceptual framework. Through the process of analytic abduction, I summarized the ideas of interview participants that were similar to the categories and related features of the conceptual framework. As well, I outlined a number of ideas that varied from the framework. While some of the suggestions shared by interview participants were similar to the literature, other perspectives varied from that information. Nonetheless, the variations did not alter the essence of the categories in the conceptual framework. Hence, I was able to compare the original ideas from the literature that informed the development of the conceptual framework with the new information shared by study participants through the interview process. In so doing, I could demonstrate the similarity of participant perspectives with concepts from the literature and the corresponding nature of new and varied ideas shared in the interview process.

In each category, participants in this study were able to expand and enhance the concepts originally identified from the literature as well as provide additional ideas that were not originally considered from my review of literature. Consequently, in response to the second question raised in this study, I found that the perspectives of interview participants were similar, or related to the information in the literature on planning for change. Again, while the participants added new ideas that were not originally considered in the review of literature and while the perspectives of participants varied somewhat, the new ideas and variations expressed did not alter the spirit or intention of the categories I had developed to summarize and structure the literature.

In response to the third question in the study, I attempted to determine whether there were planning practices of school divisions participating in this study that were effective and functional and would serve to construct a framework for organizational improvement and change. In order to pursue this question further, I synthesized participant perspectives of effective planning practices that were both similar to and variable from the literature and organized them according to the categories of the analytical framework.

Results

In the category of *Context*, participants from school divisions identified that effective planning involved both active and collaborative approaches with a focus on improvement. It became clear through the interview process that the primary purpose for planning was to make a positive difference in the lives of children. The groups or individuals most frequently identified in setting school division visions or outcomes were the members of the boards of trustees and members of the senior administrative teams. Members of other partner groups, including parents, school administration, school staff, and students, were more involved in narrowing the

gaps in the planning process. Extending the planning circle or planning more deeply was identified as a challenge by participants in this study. Although other partner groups were invited to have input into setting divisional outcomes, their involvement in divisional planning was not consistent across school divisions. According to participants, parents had more involvement in planning at local schools than at the division level. Several school divisions highlighted student voice as a critical aspect in planning for educational change. Examples of student voice in planning ranged from the creation of artwork and participation in service learning to involvement in divisional consultations and contributions to individual education plans.

From the perspective of *Capacity*, planning in this study was centred on the consolidation of school division processes and development in the areas of Student Behaviour, Threat and Risk Assessments, Divisional Supports for Students, School Readiness, English as an Additional Language, Inclusion, and Teaming. Participants placed emphasis on practical skill building in planning through various professional learning opportunities with resource teachers' and school counsellors' study groups, summer institutes, or professional development components at staff meetings. School division administrators in the study shared examples of initiatives to connect research to practice through book studies, article reviews, professional reading, study trips, as well as developing relationships with guest authors and facilitators. The focus of research done by school divisions in this study centred on vision setting, ethical leadership, and the change process.

In the category of *Climate*, participants noted that public communication regarding school division goals was most often shared through division websites and recently through wiki pages and web logs. Participants shared that clear, consistent, and transparent messages were critical, especially in the areas dealing with provincial grants and divisional or student funding. Participants expressed concerns that ambiguous messages could create confusion or could cause a plan to collapse. As a result, a common suggestion involved having a facilitator who could listen, reserve judgment, and remain open, flexible, and adaptable to possibilities. Participants from one school division suggested that an appreciative stance, a lens that focuses on a positive or synergistic worldview (Bushe, 1995), would keep planning directed toward the future and focused on solutions. The idea of distributing the leadership to include those in student services positions or to include those with a particular interest area arose as a solution to facilitating the challenging planning conversations that might occur. Nonetheless, there was consensus that conflict was inevitable when planning was set in a context of competing ideas and resources. Interview participants suggested that the use of a structured process or framework to approach planning might also assist when challenge or conflict was present.

In the category of *Structure*, participants believed that while planning was quite organized in theory, it was far more disorderly in practice. They reinforced the importance of keeping planning current and relevant and not losing sight of how a plan would be implemented in daily life. Participants recommended that

school divisions concentrate on developing fewer outcomes as opposed to working haphazardly on more elaborate plans. One participant believed that, by not aiming directly at outcomes, planners would be more successful at eventually attaining their goals. Planning participants suggested the establishment of broad outcomes at the division level with more specific, SMART (specific, measurable, attainable, realistic, timely) outcomes at the school level supporting classroom or individual planning endeavours. They also spoke of the importance of alignment between divisional outcomes, school plans, unit plans, lesson plans, and individual education plans. Most preferred to use locally developed planning structures but enacted the Manitoba Education planning template and process as a requirement and a guide.

In the category of *Strategy*, I noted a concern among participants in this study that data collected was not necessarily informing school division practice. School division personnel related that many were at the early stages of data collection and were actually establishing baselines, rather than interpreting or challenging findings. School division staff reported that they were also in the early stages of development regarding data management, storage, and related technological systems. They identified creative thinking and provision of choices as critical to success in planning. Several school divisions in the study, for example, were creatively using resources and funding to adjust traditional configurations of staffing based on evidence provided by the data. In the end, participants agreed that the planning process should be data informed rather than data driven.

Conclusion

In summary, according to the literature reviewed and perspectives of participants in this study, planning was most effective and functional (having the intended or expected effect and practical utility) when school divisions

- engaged in a *context* of active, collaborative planning with designated individuals involved, considered global perspectives, allowed for locally based processes, and shifted to an inquiry or improvement stance
- built *capacity* to extend and embed planning systems, developed alignment and congruency of practice, communicated collective moral purpose, planned for improved learning, and focused on practical skills
- maintained a *climate* with open and transparent communication, took an appreciative stance, used a structured approach and positive tone, designated leaders to facilitate challenging planning dialogue, and expected that planning might be a disorderly process
- established *structure* to keep planning practices relevant and authentic, ensured a link between theory and practice, generated consistent and definable measures of data, provided data to inform the system, and allowed for student voice

- created *strategy* to establish socially based relationships and networks; generated opportunities to share, reflect, and learn; aligned resources to support action; became creative, innovative, and flexible; and set causal indicators to support the attainment of planning outcomes

The information from this discussion was transcribed into a framework in Table 1, intended for use and reference when school divisions are planning for organizational improvement and change.

Implications for Practice

The results of this study clearly demonstrate that there are key features of school division planning, both identified in the literature and from the perspectives of educators in participating school divisions, that would serve to improve linkages between strategic educational intentions and related actions. The information that was summarized and transcribed in the new framework consolidated the archetypes of planning at the school division level, particularly in the context of educating students with challenging learning behaviours. By addressing and implementing the key features identified in the framework, educators might not simply view planning as a rationalized or bureaucratic function but, rather, as an active and authentic process that could set the stage for organizational improvement and positive change.

Table 1 ARCHETYPES OF EFFECTIVE AND FUNCTIONAL PLANNING	
Categories for Analysis	Key Features of Effective Planning (According to the Literature and Interview Participants)
Context	Move to an active, collaborative approach. Increase the numbers of designated individuals involved. Consider global outcomes at the division level. Allow for locally based processes and structures. Shift to an improvement- or inquiry-based stance
Capacity	Extend and embed planning at all levels. Develop alignment and congruency of practice. Communicate collective moral purpose. Plan to improve learning and redesign schools. Focus on practical skill building among staff.
Climate	Maintain open and transparent communication. Approach planning with an appreciative stance. Use a structured approach when conflicts arise. Designate leaders to facilitate challenging dialogue. Expect that planning will be disorderly in process
Structure	Keep planning relevant and authentic. Ensure a link between research and practice. Generate consistent and definable data. Provide evidence to inform the system. Allow for student voice as a data source.

continued

Table 1 ARCHETYPES OF EFFECTIVE AND FUNCTIONAL PLANNING (CONTINUED)	
Categories for Analysis	Key Features of Effective Planning (According to the Literature and Interview Participants)
Strategy	Establish socially based relationships and networks. Create opportunities to share, reflect, and learn. Align resources to support action. Be creative, innovative, and flexible. Set causal indicators to better attain outcomes.

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INFORMATION MANAGEMENT FOR PEOPLE WITH DISABILITIES IN MANITOBA⁹ BY YOUN-YOUNG PARK¹⁰

Introduction

Educational accountability refers to “the demand for evidence that the schools are working effectively and that students are learning the skills they need” (Elford, 2002, p. 1). Researchers suggest that a well-established data-collection system for students with special needs helps promote accountability of educational services by yielding consistent and chronological data about student outcomes (Thurlow, Elliott, & Ysseldyke, 2003). In addition, DeStefano and Wagner (1992) noted that such a data-collection system can be useful to (a) measure school outcomes of students with special needs, (b) identify ways to improve educational and social services and policies, (c) ensure the accountability of programs and services, (d) provide an accurate picture of the adult outcomes of individuals with disabilities (e.g., employment, residential placement, and community integration), and (e) examine the effects of a specific intervention or system change.

Some information components about students with special needs are recognized as useful for schools to track. Madaus, Bigaj, Chafouleas, and Simonsen (2006) made a proposal suggesting what kind of information schools should maintain regarding students with special needs. The necessary data included (a) demographic information, (b) student’s post-secondary goals, and (c) student performance. In addition, most educators agree that the major goal of public education is the development of individuals who are able to function successfully in society and be contributing members of the community (Owings, Hennes, Lachat, Neiman, and Facchina, 1990). Researchers and professionals contended that schools will benefit from learning post-school outcomes of their students; this will ensure that school programs remain germane to the post-school needs of students with special needs, thus increasing the effectiveness of their performance and better coordinating educational programs with adult services (Bruininks, Wolman, & Thurlow, 1990).

Researchers emphasized the need to define common domains of student outcomes and consistent indicators of outcomes as standards in a data-collection system for students with special needs (Owings et al., 1990; Thurlow et al., 2003). Although most provinces in Canada require that schools utilize an individualized education plan or something equivalent as an essential tool to plan for educational programs for students with special needs and to maintain information about them, few

⁹ Park, Youn-Young. (September 22, 2010). *A school-to-adulthood transition follow-up system for youth with disabilities in Manitoba*. University of Manitoba Ph.D. dissertation. <http://hdl.handle.net/1993/4229>

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jurisdictions are found to have a systematic data-collection mechanism to aggregate the data about students with special needs. The purpose of this study is to examine the current data-collection practices for students with disabilities and young adults with disabilities in Manitoba.

Methods

This study consists of (a) a telephone survey on schools' and school divisions' data-collection practices and (b) a mixed-method survey on the government's data-collection practices. These surveys were conducted from February 10 to July 31, 2009.

Telephone Survey on Schools' and Divisions' Data-Collection Practices

The purpose of the telephone survey was to investigate the current data-collecting practices of high schools and school divisions in Manitoba regarding students with special needs in the transition process from secondary school to adulthood. Surveys have been widely endorsed as a desirable research method to identify the trends and characteristics of practices with a large population (Creswell, 2008). The research questions of this survey were

1. What information do high schools and school divisions (i.e., student services) collect about students with special needs?
2. How do high schools and school divisions collect and maintain information about students with special needs?

I describe the features of this survey including the subjects, survey questionnaires, and the data collection and analysis below.

Subjects

I recruited the subjects with the assistance of high school principals and the directors/coordinators of the student services departments who distributed the recruitment letter to those responsible for managing databases of students with an individual education plan (IEP) or individual transition plan (ITP) in their schools or departments. Participation was on a voluntary basis.

The subjects of the survey included 49 high school special education/resource teachers and 16 student services administrators in Manitoba. Of the 38 school divisions in the province, 23 gave approval for me to approach their staff to participate in the study. Those divisions included 88 secondary schools (out of 319 secondary schools in Manitoba). I requested the voluntary participation of one special education or resource teacher from each high school and one student services administrator from each school division. Therefore, the response rates of teachers and student services administrators to this telephone survey are 55.7% (49 out of 88) and 69.6% (16 out of 23) respectively. Although the participation rate of teachers and student services administrators in rural areas (65.3%, 68.8%) was higher than that of

those in urban areas (34.7%, 31.2%), the participants were well distributed across the province.

Survey Questionnaires

I developed a questionnaire for both schools and student services departments in school divisions. The questionnaire consisted of yes/no questions asking whether they collect certain information about youth with disabilities. The information components for schools and student services include (a) youth characteristics (e.g., age, gender, type of disability, health concerns), (b) family characteristics (e.g., primary caregiver, residential area), (c) contact information (e.g., phone number, address, email), (d) school programs/transition services provided (e.g., IEP/ITP, vocational training, courses), and (e) student outcomes and assessments (e.g., attendance rate, GPA, reading level). I had the survey questionnaire for schools and school divisions verified by two high school special education teachers and two student services administrators.

Data Collection and Analysis

I conducted one phone interview with each respondent. Each phone interview with teachers and student services administrators lasted 15 to 30 minutes. Prior to the phone interviews, I briefed each subject on my study and obtained their consent. Once a phone interview was completed, each subject had a chance to review the completed questionnaire. No compensation was provided for the respondents. I analyzed the information components that were commonly and less commonly maintained by schools and school divisions and the way the information was collected and maintained.

Mixed-Method Survey on Government's Data-Collection Practices

I conducted a mixed-method survey of government representatives and government documents, utilizing telephone surveys, in-person surveys, and document review to investigate the current data-collection and data-maintenance practices of the Manitoba government regarding youth with disabilities. The research questions of this survey were as follows:

1. Which departments of the government in Manitoba are the major agencies that collect and maintain information about youth with disabilities?
2. What information do the departments identified as the major data-collection agencies collect and maintain about youth with disabilities?
3. How do those departments collect and maintain information about youth with disabilities?

I describe some features of this survey including the subjects, the survey questionnaire, and the data-collection procedure below.

Subjects

The subjects of the survey were government representatives: one representative from Manitoba Education and four representatives from Family Services and Consumer Affairs (FSCA) programs that provide services to people with disabilities, including Vocational Rehabilitation (VR), Supported Living (SL), Employment and Income Assistance (EIA), and Children's Special Services (CSS). I recruited the subjects through the senior managers of the identified programs who distributed a recruitment letter and a sample survey questionnaire to the most suitable representatives. The criterion for suitable respondents was that they be in charge of maintaining information about people with disabilities in their programs. I recruited one representative from each of the programs. Participation was on a voluntary basis.

Survey Questionnaires

I utilized two survey questionnaires: one for Manitoba Education and Children's Special Services (CSS) of FSCA and one for the three adult programs (i.e., VR, SL, EIA) of FSCA. The questionnaire for the representatives of Manitoba Education and CSS consisted of the same questions that were used for schools and student services departments. The survey questionnaire for the representatives of the three adult programs of FSCA, however, contained questions about their data collection on youth with disabilities in the areas of (a) youth characteristics, (b) adult outcomes of former students (e.g., residential and job conditions), and (c) adult services provided for youth with disabilities (e.g., vocational training, residential services). Finally, I had the survey questionnaire for FSCA verified by one FSCA administrator.

Data Collection and Analysis

I conducted a telephone survey with three government representatives and an in-person survey with two by their choice. Each phone or in-person interview with the government representatives lasted 30 to 45 minutes. Prior to the phone interviews, I briefed each subject on my study and obtained their consent. After the surveys, some respondents provided supplementary documents (e.g., consumer information forms, guidelines used for information collection for their consumers, and program websites) that helped me understand their data-collection practices regarding people with disabilities. Once an interview was completed, I sent a summary of the interview to the respondent through email, asking each subject to verify his or her answers. No compensation was provided to the respondents.

The data I obtained from the telephone and in-person interviews with the government representatives included (a) completed questionnaires, (b) supplementary documents provided by the interviewees, and (c) the minutes that I wrote during and after the surveys. From these data, I identified the information components that each government program maintained and the way they collected and maintained data about their consumers.

Results and Discussions

The surveys generated quantitative data on the type of information and descriptive data maintained by high schools, student services departments, and the government departments (i.e., Manitoba Education and FSCA) regarding people with disabilities. Tables 2 and 3, at the end of this report, summarize that information. In this section, I discuss a few key issues identified from the results.

This study shows that schools and some government adult programs (i.e., Supported Living Program, and Employment and Income Assistance Program) collect and maintain a broad range of information about students with special needs and adults with disabilities in Manitoba respectively. On the other hand, student services departments in school divisions, the provincial education department (Manitoba Education), and Children's Special Services (CSS) at FSCA keep comparatively limited information about the smaller number of students for whom they provide direct funding or service supports. The information that schools maintain about students with special needs includes students' characteristics (e.g., age, gender, type of disability, functional skills), school programs and services provided (e.g., IEPs/ITPs, counselling, therapies, courses taken), and student outcomes and assessments (e.g., IEP/ITP goals, attendance, reading and writing level). The student information is stored in various forms, such as individual education plans (IEPs), individual transition plans (ITPs), cumulative files, formal and informal assessments, and other school documents.

Among the government programs that provide supports for adults with disabilities, Supported Living Program and Employment and Income Assistance Program of FSCA are those that keep detailed information about adults with disabilities. Supported Living Program coordinates services for adults with intellectual disabilities in the province, and Employment and Income Assistance provides support for people who require financial assistance, including adults with various disabilities. They collect information about adults with disabilities with their intake process and annual updates on their consumers, including (a) individuals' characteristics (e.g., birth date, type of disability, functional skills, level of self-determination), (b) school information (e.g., IEP/ITP goals and outcomes, reading and writing level, academic achievement, school completion status, school programs and services provided), (c) adult programs and services provided, and (d) adult outcomes (e.g., employment, post-secondary education level, residential status).

Although schools, Supported Living Program, and Employment and Income Assistance Program track extensive and detailed information about people with disabilities, two information elements overlooked by them are particularly notable: (a) the level of individuals' and their caregivers' satisfaction with or perceptions of the services provided for them, both for students with special needs and adults with disabilities, and (b) the level of individuals' self-determination. Only a few schools indicate that they record students' and families' satisfaction with the school programming and other services provided. This echoes the findings of Test, Eddy, Neale, and Wood (2004) that only 36.3% of 280 teachers in their study reported that they collected data about students' satisfaction with programs provided. In addition, Supported Living Program and Employment and Income Assistance Program do not examine their consumers' satisfaction with the programs and services provided. This is consistent with the findings of several researchers who suggest that subjective aspects of outcomes are often overlooked (Turnbull, Turnbull, Wehmeyer, & Park, 2003). A lot of researchers argue that, when examining school programs and services provided, the consumers' perceptions of those services need to be investigated (Test et al.). Increasing numbers of researchers have stressed self-determination as a critical factor that contributes to positive school and post-school outcomes (Getzel & Thoma, 2008). However, it is another information element that is not regularly recorded by schools or government programs. For those who recorded the level of self-determination, the most common indicator used was the individual's need for a substitute decision maker.

This study confirms that no consistent data-collection system exists in the school system across the province or in different programs of the government to track individuals with disabilities. Schools, school divisions, and some government departments, such as Manitoba Education and FSCA maintain data on people with disabilities to whom they provide services. The populations of their consumers are different depending on the eligibility criteria (e.g., age, intellectual functioning, medical needs) for each program. In addition, these agencies do not share their information with each other. Hence, current data collection for people with disabilities is fragmented at the provincial level, and there is no existing means to see the "big picture" as to how youth with disabilities are doing and how well the Manitoba support system is performing for them. Furthermore, the definitions of the terms that they apply in collecting and maintaining data about people with disabilities tends to be inconsistent among teachers and counsellors of adult programs, especially in areas such as types of disability, diagnosis, functional academic skills, and life skills. For example, information regarding the level of self-determination is recorded in various ways (e.g., whether the individual has or needs a substitute decision maker; communicative ability to express preferences, interests, likes, dislikes, etc.; ability to set life goals on his or her own). This inconsistent data management about people with disabilities makes it very challenging to exchange information between schools, between school divisions, and between the school system and adult support system. Due to these fragmented data management practices for people with disabilities in Manitoba and to the way the information is stored (i.e., mostly in paper forms), the significant time and efforts made to gather

and maintain the information tend to be wasted for any purpose other than local use.

In summary, the results of this study show that schools and some adult support programs spend a significant amount of time and effort to collect information about youth with disabilities and maintain comprehensive data. Such commitment, however, often has limited benefits because (a) terms used are confusing and inconsistent, (b) the collected data are often used only internally within a school or program, and (c) much of the paperwork is done repetitively on a yearly basis (e.g., IEPs, ITPs). These findings emphasize the need for a consistent, efficient data-management practice for both students with special needs and adults with disabilities in Manitoba. I recommend the following approaches to establish such a practice:

- Clarify and define terms that are commonly used by schools and adult programs for people with disabilities.
- Develop a standard information template so that schools and adult programs can gather a set of common data about this population.
- Utilize a computerized database.

These will facilitate sharing information and communication among individuals, families, and professionals. Also, the efficiency of data management can be increased with a computerized database, which can allow updates of data without re-entering the same information. In addition, digitalized data will enable mass information to be analyzed in such a way that meaningful knowledge can be efficiently generated, such as demographic trends, gaps in services, and factors to successful outcomes. The benefits that a consistent, efficient data-management system can generate will be much greater than those of the current practice in Manitoba.

Table 2		INFORMATION OBTAINED ABOUT STUDENTS WITH SPECIAL NEEDS			
Information Maintained	Teacher N=49 (%)	Student Services N=16 (%)	ME* (Yes/No)	CSS** (Yes/No)	
Individual's Characteristics					
Age	49 (100.0)	16 (100.0)	Yes	Yes	
Type of disability	49 (100.0)	16 (100.0)	Yes	Yes	
Medical/diagnostic information	49 (100.0)	16 (100.0)	Yes	Yes	
Functional skills	49 (100.0)	16 (100.0)	Yes	Yes	
Gender	49 (100.0)	15 (93.8)	Yes	Yes	
IQ	46 (93.9)	15 (93.8)	No	Yes	
Post-secondary goals	38 (77.6)	9 (56.3)	No	Yes	
Level of self-determination	29 (59.2)	5 (31.3)	No	Yes	
School Programs/Transition Services Provided					
IEP or ITP developed	49 (100.0)	15 (93.8)	No	No	
Academic courses taken	49 (100.0)	14 (87.5)	No	No	
Support services provided	49 (100.0)	14 (87.5)	No	No	
Placement (i.e., hours in regular/special classroom)	48 (98.0)	15 (93.8)	No	No	
Student-specific life skills training and courses taken	48 (98.0)	13 (81.3)	No	No	
Work experiences done	46 (93.9)	14 (87.5)	No	No	
Vocational training and courses taken	45 (91.8)	14 (87.5)	No	No	
Age of a student to address transition issues	43 (87.8)	14 (87.5)	No	No	
Extracurricular activities participated in	39 (79.6)	7 (43.8)	No	No	
Parent satisfaction with school programs/services	16 (32.7)	3 (18.8)	No	No	
Student satisfaction with school programs/services	15 (30.6)	3 (18.8)	No	No	
Student Outcomes and Assessments					
IEP goals and outcomes achieved	49 (100.0)	15 (93.8)	No	No	
Attendance	49 (100.0)	14 (87.5)	Yes	No	
Grade level equivalencies in reading, writing, math	47 (95.9)	13 (81.3)	No	No	
Diploma or certificate awarded	45 (91.8)	15 (93.8)	Yes	No	
Modified/adapted assessment results	45 (91.8)	6 (37.5)	No	No	
School completion status	44 (89.8)	12 (75.0)	Yes	No	
Averages in specific courses	44 (89.8)	10 (62.5)	Yes	No	
Provincial Standards Test scores	43 (87.8)	9 (56.3)	No	No	

* ME: Manitoba Education

** CSS: Children's Special Services

Table 3	INFORMATION MAINTAINED ABOUT ADULTS WITH DISABILITIES BY GOVERNMENT		
	Information Maintained	SL**	VR***
Employment Outcomes			
Employment status	Yes	Yes	Yes
Job satisfaction	No	No	No
Type of jobs	Yes	Yes	Yes
Job stability	Yes	Yes	Yes
Work hours	Yes	Yes	Yes
Financial status	Yes	Yes	Yes
Job benefits	No	No	No
Job acquisition method	No	No	No
Post Secondary Education Outcomes			
Type of educational program	Yes	Yes	Yes
Field of study	Yes	Yes	Yes
Full/part-time enrolment	Yes	No	Yes
Residential Outcomes			
Living status	Yes	Yes	Yes
Marital status	Yes	Yes	Yes
Contribution to living expense	No	No	No
Other Aspects of Life			
Psychological well-being/autonomy	Yes	Yes	Yes
Community living	Yes	Yes	Yes
Social network	Yes	No	Yes
Physical well-being	Yes	No	Yes
Adult Program/Service Needs			
Service needs	Yes	No	Yes
Services received	Yes	Yes	Yes
Service satisfaction	No	No	No

* FSCA: Manitoba Family Services and Consumer Affairs

** SL: Supported Living

*** VR: Vocational Rehabilitation

**** EIA: Employment and Income Assistance

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PERSPECTIVES OF NORTHERN MANITOBA SCHOOL PRINCIPALS REGARDING NEW SPECIAL EDUCATION LEGISLATION¹¹ BY JOAN ZARETSKY¹²

Introduction

In 2005, the Manitoba Government enacted the first ever legislation in the province regarding the education of students with special needs. It was the last province to pass legislation that aligned with equality rights as set out in the *Canadian Charter of Rights and Freedoms* proclaimed in 1985. *The Public Schools Amendment Act (Appropriate Educational Programming)* requires school divisions to provide “appropriate educational programming” for all students within their jurisdiction. While school divisions were named as the body mandated to provide this education, school principals, as agents of the school division, were legally designated within the regulations and accompanying standards as accountable for ensuring compliance.

The purpose of this study was to obtain formally documented data demonstrating the capacity of principals in northern Manitoba to comply with their newly mandated expectations. The rationale for the study was threefold. The primary rationale centred on anticipated changes to the professional practices implemented by Manitoba principals as a result of the newly mandated regulations. The second rationale dealt with the selection of the sample, recognizing the extreme challenges principals in northern Manitoba face in accessing the resources they require for implementation and, ultimately, compliance. The final rationale was the fact Manitoba Education did not overtly appear to be monitoring the implementation of the new legislation nor collecting indicator data to ensure compliance with the legislation.

Thus, this qualitative research study was designed to document and analyze the perceptions of northern Manitoba principals regarding the mandated changes to their roles within their school contexts and their capacity to comply with the newly proclaimed legislation. The principals’ perspectives of the supports and challenges they experienced in their compliance efforts were formally examined.

¹¹ Zaretsky, Joan Darlene. (January 7 2011). *A study of northern Manitoba principals’ perspectives regarding new special education legislation*. University of Manitoba Ph.D. dissertation. <http://hdl.handle.net/1993/4327>

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The methodology selected for this qualitative research involved in-depth individual interviews conducted in June 2007, 18 months after the legislation had been proclaimed, in the natural home setting of the informants (Bogdan & Knopp Biklen, 2003, 2007; Merriam & Associates, 2002). The interview protocol (Seidman, 2006) was designed to focus specifically on the issues identified by the school principals as being significant to their capacity to comply with the new legislation. Fifteen school principals were interviewed in the four school divisions recognized as being northern divisions.

This study is significant because of the current scarcity of Canadian research in special education in general, but especially regarding the role of school principals in their attempts to comply with provincial legislation addressing the rights of students with special needs. The data collected and analyzed will, we hope, be helpful in informing the educational community about issues in inclusive special education, policy implementation, and educational leadership, all of which need to be addressed in order to ensure compliance with new legislation in remote northern Canadian educational settings.

Review of the Literature

There are four key themes in the special education literature that served to inform and frame this research. These are (a) the historical development of special education in Canada and Manitoba; (b) the changing role of the school principal in the provision of special education programming; (c) factors that influence how principals interpret their leadership role; and (d) common issues and challenges in the provision of education to students in rural and northern geographical contexts.

The Historical Development of Special Education

The key milestones in the historical development of special education within Canada and Manitoba—with regard to general trends, legislative development, and parent and advocacy group support—provide the foundation upon which the new legislation was developed and offer some insight into the past experiences of school principals. It should be noted there is inadequate research and literature on the history of special education in Canada. In Manitoba there are the notable exceptions of Blais and Van Kemp (n.d) and Lutfiyya and VanWalleghem (2001).

The Changing Role of the Principal in the Provision of Special Education

The proclamation of the new legislation in Manitoba resulted in an expansion of mandated expectations for Manitoba principals. There is little research published or articles written specifically about the role of principals in special education in Canadian education literature (Lupart, Loreman, & McGhie-Richmond, 2010). While the roles and responsibilities of principals have been outlined in other Canadian provincial legislation (Alberta Learning, 2004; Alyward, Farmer & McDonald, 2007; British Columbia Ministry of Education, 2006; MacKay, 2006; Ontario Ministry of Education, 2003), there is no such guidance provided by Manitoba Education.

Factors Influencing How Principals Interpret Their Role

There are many factors identified in the literature that contribute to principals' interpretation of their roles, with legislation and effective professional development being of great significance in influencing their leadership practices and facilitating changes in the realities of their day-to-day school business (Bateman & Bateman, 2006; Borko, 2004; Duchesne, 2004; Fullan, 2003; McLaughlin & Nolet, 2004; Sage & Burello, 1994; Smith & Colon 1998; Stewart, 1998). The function played by Manitoba Education's voluntary Administrator Certification requirements in assisting principals to understand their legislated role can be minimal, depending upon the principal's personal selection of coursework.

Issues and Challenges of Rural and Northern Contexts

The final section of the literature review of factors influencing the informants' capacity to comply recognized common issues and challenges significant to providing special education in rural and northern geographical contexts across Canada and within Manitoba. Some of these challenges include the impact of working in an isolated setting, the influence of the demographics of the community, the impact of resource allocation upon the provision of services, and the use of technology (Barter, 2010; Wallin, 2009).

The factors identified under these four key topics had an impact upon the principals interviewed within this study in their attempts to implement their new mandates. One critical point to note is, while principals may have a legislated responsibility to meet mandated expectations, they may not understand, or be able to fulfill, their responsibility. Their capacity for compliance is difficult to determine in a province that does not publicly monitor school division compliance with the new legislation. The legislative context in Manitoba makes the analysis of effective implementation of and compliance to legislation very complex.

Emerging Themes

Common themes extracted from the interview transcripts included the informants' awareness and understanding of the new legislation and regulations, and the supports and challenges principals in northern Manitoba faced in their attempts to comply with the new legislation.

Professional Development

With regard to their knowledge of their regulatory mandates, most of the principals interviewed could readily discuss the essence of the regulations when prompted. Most informants appeared to understand the requirements of the new regulations but expressed some uncertainty as to how these requirements were translated into daily classroom practices in their schools. The most common format identified by these principals as their means of learning about their mandated role was discussion held at principals' meetings, generally led by their superintendents and student services administrators. They expressed a need for additional professional learning opportunities to converse on the many practices, perspectives, and philosophies that supported and challenged their understanding of the legislation.

Supports

When discussing their supports, in all cases the principals readily identified a number of human resources, such as their resource teachers and the divisional student services staff, who bolstered their ability to meet their specifically designated legal mandates. At no time did they express frustration at having to face their new legislative requirements alone. While the legislation dictates "the principal must ensure," most principals readily acknowledged their dependence upon the knowledge, skills, and expertise of their in-school team to assist them in fulfilling their mandates.

Challenges

The third theme that emerged incorporates the many challenges that principals identified as affecting their abilities to comply with the legislation. These challenges included (a) imprecise terminology; (b) contradictory influences on principals' practices; (c) perspectives on the role of parents; and (d) the provision of specialized assessment.

There appeared to be a need for clear, concise definitions of terms such that all divisional staff, school division administrators, and principals understood exactly what was required for compliance. Principals revealed a lack of clarity as to the exact meaning of various terms including *appropriate* educational programming, *specialized assessment*, *individual education plans*, and *parental involvement*.

A second challenge for the informants was the inconsistent messages they were receiving from different influences regarding the provision of appropriate educational programming. The direction offered was sometimes contradictory and placed principals in a quandary as to which set of rules to follow. Some principals experienced confusion because of different expectations resulting from legal mandates, divisional policy requirements, advocacy group expectations, and community and school cultural presumptions based upon accepted past practices.

Much discussion during the interviews was stimulated by principals discussing their perspectives regarding the roles and responsibilities of the parents. All principals recognized the value of parental involvement in all aspects of their children's programming. However, some informants experienced great difficulty in their attempts to contact parents. The result was parents who were totally left out of any decision making regarding programming for their children. Many openly questioned the acknowledgement, and acceptance, of responsibility by the parents in supporting the school in meeting their children's needs.

The last challenge revealed in the data referred to the perceived struggles principals experienced in their attempts to provide specialized assessments for their students with special needs. The provision of specialized assessments in a "reasonably practicable" timeframe was difficult for all but three principals. Some school divisions denied principals' requests for assessments, as there was a quota system in place limiting the number of assessments allowed each year. There was a shortage of resource teachers possessing their special education certificates and of specialized clinicians, both internal and external to the school division. The inevitable effect of these shortages was delayed timeliness of the administration of assessments, with principals being placed in the position of having to select which students would receive an assessment within a given year. Principals experienced ethical dilemmas in making this determination in the absence of divisional criteria or protocol.

In conclusion, most of the informants in this study were very well versed in the actual regulations and expressed concerns when it came down to implementation in their school context. There were many factors influencing the capacity of the principals to implement the legislation, including the shortage of clinicians to administer specialized assessments, the shortage of resource teachers with their special education certificates, staff who were resistant to change, the sometimes flawed interpretation of the regulatory requirements by central office staff, and an inconsistent understanding and application of the terminology, to name a few. When I asked principals to offer a recommendation for their student services administrators, their superintendents, and Manitoba Education, the most frequent request they expressed to assist them in their compliance was for additional funding to be used for the purpose of hiring additional human resources and providing professional development opportunities.

Conditions to Support Compliance

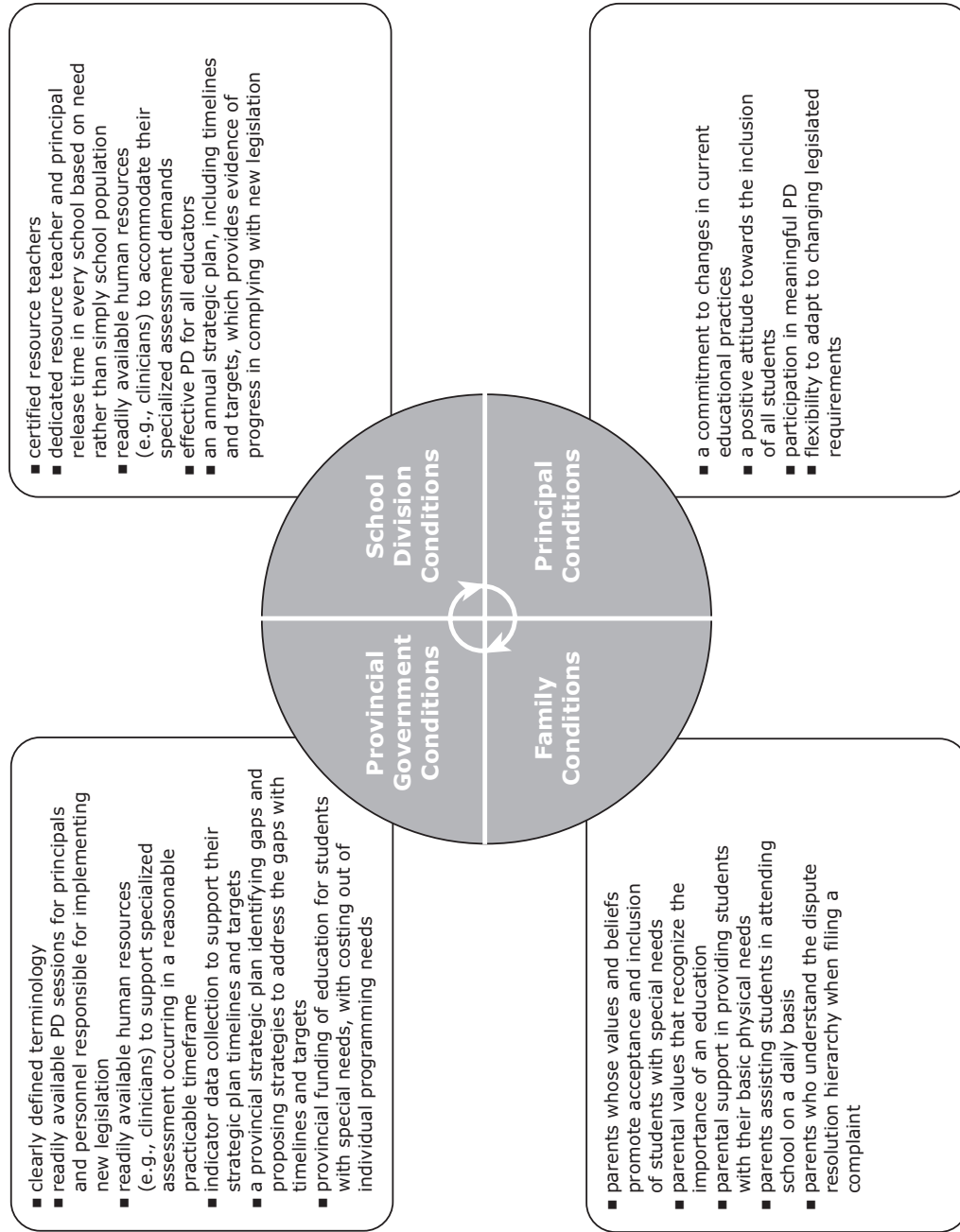
In an attempt to put these findings into a meaningful context, I developed a framework entitled “Enabling Conditions Supporting Principals’ Compliance with New Special Education Legislation: A Shared Responsibility.” The framework represents the multi-faceted issues that the informants described as being influential in their capacity to comply with the legislation. The enabling conditions fell into four areas of stakeholder responsibility: (a) provincial government conditions; (b) school division conditions; (c) family and school community conditions; and (d) personal principal conditions. In each quadrant, conditions were devised as a result of the concerns expressed by the informants and their effect on the ability of the informants to be compliant. Figure 1 on the following page depicts the framework.

While there are four quadrants with 20 conditions in total, the enabling conditions of the provincial government quadrant serves as an example of the type of issues identified. There were six provincial government conditions which principals acknowledged as playing a significant role in their abilities to comply with the new legislation: (a) clearly defined terminology; (b) readily available ongoing PD sessions for all principals and educators; (c) readily available human resources (e.g., certified resource teachers and clinicians) to support the administration of specialized assessment; (d) the collection of indicator data that would offer direction to the principals; (e) a provincial strategic plan identifying compliance gaps and proposing strategies to address these gaps with timelines and targets; and (f) provincial funding to support their many ongoing challenges of educating students with special needs living in northern Manitoba.

In conclusion, the perspectives of the principals collected in the interviews led to my development of the framework “Enabling Conditions Supporting Principals’ Compliance with New Special Education Legislation: A Shared Responsibility.” Each of the four quadrants represents a stakeholder who can support the principals’ capacity to comply. The provincial government, the school division, the parents, and the individual principal themselves all have a collaborative role to play. The successful implementation of the conditions in any one of these quadrants would not guarantee compliance without the benefit of the other conditions in the other quadrants. Leithwood and Earl (2000) discussed the assignment of responsibility and accountability for a person holding a hierarchical role within an organization. They suggested it is “questionable whether a person or an organization should be held accountable for matters involving a shared, causal responsibility” (p. 5). They noted it is unreasonable to hold an individual, regardless of his or her hierarchical stature, “accountable for expected performances that are impossible to satisfy” (p. 4) and further, “nor is it legitimate to hold a person solely accountable for expected performances requiring a shared influence” (p. 5). This was echoed by the principals as they discussed and revealed their many concerns with meeting their newly mandated expectations.

**ENABLING CONDITIONS SUPPORTING PRINCIPALS' COMPLIANCE WITH NEW SPECIAL EDUCATION LEGISLATION:
A SHARED RESPONSIBILITY**

Figure 1



Practical Implications

While there are many practical applications resulting from the analysis of the findings, three major implications emerged: (a) the need for additional professional development that effectively addresses the needs of principals; (b) the need for clarity in terminology, roles, and responsibilities of principals; and (c) the need for system accountability.

Principals expressed a desire to have sustained professional development opportunities that address their needs and concerns based upon their contexts. Most principals expressed their desire for time to reflect and discuss, at a deeper level, the implications of the legislation on their roles. Having an opportunity to discuss scenarios or case studies similar to their own situations was suggested as one means of supporting their improved understanding, as was an opportunity to talk directly with Manitoba Education staff regarding strategic topics. Having dedicated time set aside at every principals' meeting was proposed as an effective method to ensure the time and attendance of all principals to discuss pertinent issues.

Throughout the analysis and the development of the framework, it became evident that principals required more clarity of terminology and clarity as to the role expectations for all the stakeholders in supporting compliance with the legislation. Many appeared unsure as to how all the pieces of the puzzle fit together in meeting the needs of the students. There is a role to be played by both the provincial government and school divisions to provide leadership in clarifying both terminology and role expectations. This could be done through divisional professional learning opportunities whereby clear concise operational definitions are devised and related to daily practices, and a mutual understanding of roles and responsibilities are developed among all involved in the provision of appropriate educational programming.

With the final implication being the need for system accountability, it was suggested that the collection, monitoring, and reporting of educational indicator data by both the school division and provincial government would be an asset in the development of financial and public policy to support the educational system where compliance gaps are evident. This is currently being done in other provinces through the collection of detailed school and division plans and the release, by the provincial government to the public, of educational indicator data with compliance targets. Manitoba Education may consider special categorical funding for northern school divisions to be used to hire additional human resources, to provide the coursework required by teachers to obtain their special education certificates, or to meet whatever the division establishes as a targeted goal within their context to address their compliance needs. On a temporary basis, the province may consider employing a resource pool of clinicians from which school divisions could contract services when they were finding their waitlists too long. Incentives may be offered to teachers to obtain their special education certificates or to ensure that new hires are certified or in the process of taking the required coursework to certify.

The province and the school divisions need to recognize the risks for all involved when uncertified resource teachers and/or principals have little knowledge or understanding of the legal mandates of their role.

Conclusion

While compliance with legislation is relatively low on the scale of educational leadership responsibilities promoting inclusion of students with special needs, it is a starting point when new legislation is enacted and the school principal is delegated responsibility for ensuring its implementation. It became apparent that few principals in this study were in a position whereby they were able to comply with all their regulatory mandates. Providing appropriate educational programming for all students is an undertaking that requires the support of all the stakeholders identified to assist in upholding the new legislative mandates in Manitoba. The ultimate goal for every Canadian school principal and school division or district is that every student is given the education that meets their appropriate needs and complies with the *Canadian Charter of Rights and Freedoms*. A Latin quotation “*Esse quam videni*,” translated to mean “To be, rather than to seem,” sums up my desire for all Manitoba children. I look forward to the day when compliance with the new legislation mandated in 2005 will *be*, rather than *appear to be* happening, as was described by the perceptions of many principals in this study.

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A STUDY OF THE REFORM PROCESS TO PROVIDE AN INCLUSIVE MODEL OF SERVICE DELIVERY WITHIN A MANITOBA MIDDLE YEARS SCHOOL¹³ BY TAMMY MITCHELL¹⁴

Beginnings

My beliefs about education are idealistic. They ooze of optimism, expectation, and hopefulness. I am a cheerleader for inclusive environments and practices that celebrate and respect diversity and individuality and still foster a sense of community. I believe that the goal of education is to support its entire community of learners. I wholeheartedly embrace the philosophy of inclusion, as defined in this study, and I believe in the rights of all individuals to have equal access to all aspects of citizenship. I trust that in all students, there exists the promise of potentiality. I entered into this study believing that school environments can be created that celebrate and respect diversity and individuality and still foster the self-fulfillment of all students to ensure their continued growth.

Many aspects of our everyday experiences are the result of social agreement, institutional practices, or collective social action. Our social reality, thus, is grounded in our behaviours, culture, and practices (Flamand, 2012). In the past, there was social agreement that students with special needs be excluded from public schools and regular classes; this concept became an institutional practice in education and in essence, our social reality. Collective social action—advocacy—caused some educators and policy makers to reflect on these practices and spurred research on the efficacy of segregated environments and ultimately resulted in changes to legislation in Manitoba. Manitoba Education identified its commitment to fostering inclusion as a part of the *Appropriate Educational Programming Regulation* under *The Public Schools Act* and defined it as

a way of thinking and acting that allows every individual to feel accepted, valued, and safe. An inclusive community consciously evolves to meet the changing needs of its members. Through recognition and support, an inclusive community provides meaningful involvement and equal access to the benefits of citizenship. (Manitoba Education, Citizenship and Youth, 2006 p. 1)

Over the past 30 years, some educators in Manitoba have led the way to creating inclusive school environments, a move that both advocates and provincial legislation are requiring.

¹³ Mitchell, Tammy. (July 24 2012). *A study of the reform process to provide an inclusive model of service delivery within a Manitoba middle years school*. University of Manitoba M.Ed. thesis. <http://hdl.handle.net/1993/8121>

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The Study

The focus of this study is on improving service delivery for all students, including those with special needs, with the goal of enhancing student learning and behaviour and ultimately their success. A case study inquiry process was used to explore the actions, culture, and activities of the school staff in one Manitoba middle school that, in my judgment, had moved from average to exemplary in terms of inclusive programming. I studied that school with the intent to answer these research questions:

1. What specific actions did this school staff take to move to an inclusive model of service delivery?
2. What aspects of the school's culture—beliefs, leadership, structures, processes—were important in facilitating the move from segregation to inclusion?
3. What strategies did this school employ to ensure that all students were successfully supported in inclusive settings, and what data exists to support student success?

This case study is retrospective in nature as it is based on the examination of existing data, on events that already have occurred, and on the change process one school used to move to an inclusive model of service delivery.

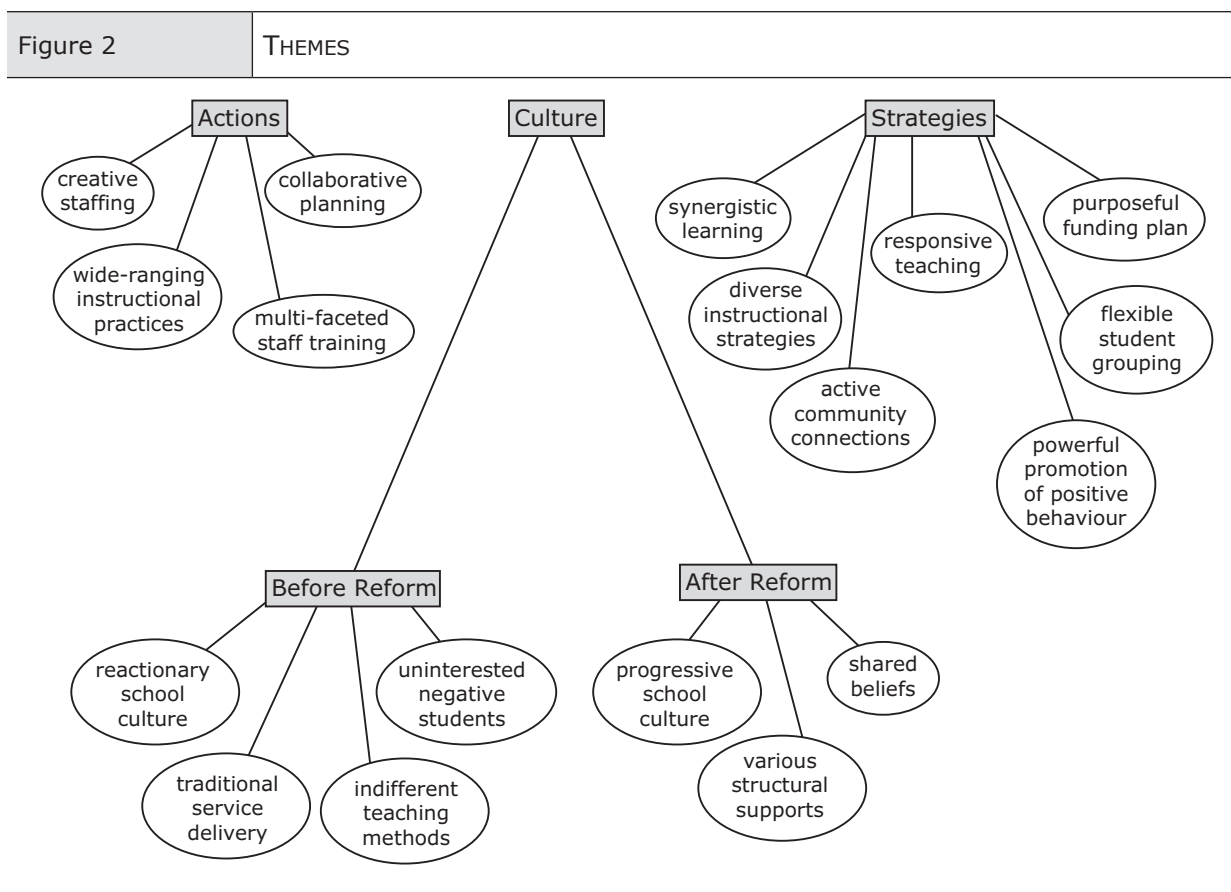
In the fall of 2010, I conducted two focus group interviews with the four staff from this middle school who volunteered to participate in the study. Internal school documents related to attendance, discipline, academics, and student perceptions also were analyzed. Analysis of the data involved the production of broad themes to generate a consolidated picture of the reform process and ensuing service delivery model. By looking backwards in time, by interviewing staff about their recollections of changes over time, and by examining student discipline and achievement data gathered over several years, I gained a sharpened understanding of the reform process used by this school staff. The discussion involves both a chronology of events and experiences and also incorporates links to current research.

Discussion

Themes

School reform in general has been examined by many; how to apply it to the context of inclusion has not. This study illuminates the actions, behaviours, and beliefs over time of one school's staff, and offers an opportunity to detail the reform process they used to become more inclusive.

I gathered a large amount of data through both the focus group interviews and the document study. The focus group interviews generated themes under the headings (a) Actions, (b) Culture, and (c) Strategies, which match the three research questions in this study. I further divided the themes found under Culture into two areas: those themes identified before the reform and those identified after the reform. Figure 2: Themes provides a visual representation of the three headings and the themes under each.



The reform process that this school undertook and the resulting beliefs, leadership, structures, and processes that make up its new culture are mired solidly in research theory about inclusive service delivery. The data from the document analysis shows improved student learning and behaviour, as well as a positive student attitude towards this school.

Research Questions Addressed

Actions Needed to Move to Inclusion

My first question was: What specific actions did this school staff take to move to an inclusive model of service delivery? I found broad themes of (a) creative staffing, (b) collaborative planning, (c) multi-faceted staff training, and (d) wide-ranging instructional practices.

To synthesize the findings from the action area, I used the actions that the focus group identified, along with the strategies the school staff employed during the change process to develop a timeline detailing the journey this school took over several years to move from segregation to inclusion. This timeline is presented as a historical scan in Figure 3. It should be noted here that the provincial legislation related to inclusion triggered discussion at the school level regarding their self-contained special education classroom. The cumulative effect of the legislation and the characteristics of the student population entering the school catalyzed this reform. In 2006, all of the staff engaged in a school plan for change using the PATH (Pearpoint, Falvey, Forest, & Rosenberg, 2003) process. PATH (an acronym for Planning Alternative Tomorrows with Hope) is a person-centered planning and goal-setting tool that uses graphic facilitation to map out a vision for a desirable future for an individual or a group of people.

A School Culture of Inclusion

Research question 2 states: What aspects of the school's culture—beliefs, leadership, structures, processes—were important in facilitating the move from segregation to inclusion? I found contrasting themes in the participants' description of the school culture before and after the reform.

As shown in Figure 2, the themes before the reform were (a) a reactionary school culture, which was characterized by (b) a traditional service delivery, with teachers using (c) indifferent teaching methods, to instruct (d) uninterested, negative students.

After reform, the themes reflected a complete shift to (a) a progressive school culture, which was characterized by (b) shared beliefs, among the staff who implemented (c) various structural supports, to support staff and students in the teaching-learning process.

In the after-reform data, the focus group participants identified sub-themes of a progressive school culture with collaborative leadership, positive relationship building among staff and students, innovative, solution-based thinking, and a commitment to continuous professional growth by staff. They found that students were keen and productive. Staff had shared beliefs related to the purposeful support of the whole child, the desegregation of classrooms and of the unequivocal link between learning and behaviour. The structural supports that existed during this

Figure 3

FROM INTENTION TO REALITY: A HISTORICAL SCAN OF EVENTS —
ONE SCHOOL'S REFORM PROCESS

✓ Key turning points							
2004	September 2005			September 2006			
resource teacher change	school literacy plan developed	✓ divisional approval to use funding differently	partnership established with university	administrator change	assessed all Grade 7 students	staff training on inclusion	staff training on differentiated instruction and assessment
✓ philosophy of inclusion discussed	self-contained special education classroom closed	outcome-based continuum developed for ELA and Math	staff training in class reviews	site-based social-worker hired	used flexible groupings of students	✓ legislation change; more staff buy-in	PATH
	✓ students with student-specific funding to enter in the fall		some student teachers hired as interns	✓ direction set by core team with shared beliefs		staff training in PBIS (Positive Behavioral Interventions & Supports)	✓ more staff supports
						re-assessed students	staff training on restorative justice

new culture included the promotion of positive behaviour, responsive teaching, and synergistic teaming by teachers, as well as their use of diverse instructional strategies within flexible student groupings. The school staff had a purposeful funding plan and made active community connections.

Strategies to Accomplish Inclusion and Data to Support Student Success

The third research question asks: What strategies did this school employ to ensure that all students were successfully supported in inclusive settings? The identified strategies fell under these themes: (a) responsive teaching, (b) synergistic teaming, (c) diverse instructional strategies, (d) flexible student grouping, (e) powerful promotion of positive behaviour, (f) purposeful funding plan, and (g) active community connections. In considering the themes identified for the second research question, it seems clear that these strategies evolved into ongoing structural supports.

Figure 3 FROM INTENTION TO REALITY: A HISTORICAL SCAN OF EVENTS — ONE SCHOOL'S REFORM PROCESS (CONTINUED)

✓ Key turning points							
September 2007							
							2010
counsellor change	whole class social skill instruction	staff training on differentiated assessment	respect agreement finalized	assessed all Grade 9 students	vice-principal change	UNESCO school candidate	staff trained in co-teaching
some teachers hired	restorative justice implemented	shared leadership model in place	✓ deliberate shift in service delivery to students	school painted	✓ no teaching assistants in the school	students trained in 7 Habits of Highly Effective Teens	staff trained in conflict resolution
	more student teachers hired	assessed all Grade 8 students		re-assessed students			re-assessed students

The data related to discipline and academic achievement and the results of a student survey were all examined as a part of this study and serve as data to support student success.

Both the suspension data and the data related to student academic achievement showed that the changes the staff put in place resulted in decreased behavioural incidents and improved academic success. The number of suspensions, the number of students involved in the suspensions, the number of days of suspension, and the total number of incidents all decreased by almost 50%. Student academic data showed marked improvements in student success. Upon school entry in Grade 7, many students were working below grade level in both math and reading; after three years of instruction in this school, almost all were working at grade level in both subject areas. The data supports the judgment that the restructuring strategies to accommodate students' learning needs positively affected their learning and behaviour.

Seven Elements of School Improvement

Peter Holly (2003) identifies seven elements of school improvement: (a) getting focused, (b) creating a shared agenda, (c) following through and sustaining changes over time, (d) grounding our change efforts in data, (e) showing our progress in data, (f) continuously improving the self-renewing school, and (g) creating a data-driven school culture.

Getting focused involves the application of shifting, prioritizing, clustering, chunking, aligning, and sequencing in order to draw attention to a manageable set of priority goals. It involves substance, what you will do, and allegiance, who will do it. To have focus, then, leads to a *shared agenda*, which is Holly's second element. He suggests that this agreement should develop through a participatory process where everyone contributes to the decision.

Focusing for this school staff involved using the available data to determine what really mattered. The staff had information from the province and the division about inclusion, they had data about student behaviour from their own school, and they had their own thinking about the culture of their school community. The administration at this school triggered this reform process by drawing the attention of school staff to the changing legislation and to the characteristics of the student population entering their school. The school staff deliberated, scrutinized, and reflected on the information and experiences they had. They decided to move to more inclusive practices by closing their self-contained classroom. They began to explore using provincial funding differently and as a result, hired pre-service teachers as educational interns versus using teaching assistants to support students' learning in regular classrooms. They hired an on-site social worker to support students and their families with student behaviour. With a change in administration and the implementation of a shared leadership structure, the focusing began in this school with a core team of staff—principal, vice-principal, counsellor, resource teachers, and grade-level team leaders. This core group identified the need for additional data on student learning and began assessing all Grade 7 students in reading and math. A class review process was implemented where teachers identified the strengths and needs of their classes through a discussion with the resource teacher and counsellor. That additional data collection sparked staff training on inclusion, positive behaviour intervention and supports, restorative justice, and differentiated instruction and assessment. Teachers began using flexible groupings of students and discussions about the changes spread throughout the school. The staff chose to participate in a PATH process to help them to focus on their school reform. The PATH process was collaborative and inclusive, involving the whole staff coming to a shared agreement about their goals. Participation in the process brought staff on board and gave them ownership and the collective resolve to move ahead with their plan. They had a shared agenda.

The importance of long-term commitment and the need to make adjustments are critical to successful change; this *following through and sustaining changes over time* is the third element, and involves monitoring progress and applying gathered feedback. In the fourth element, *grounding our change efforts in data*, Holly suggests that success criteria and data collection be used to select strategies and to support needs. Since data both drives the school improvement plan and helps to ensure that plans remain focused, Holly identifies the fifth element as *showing our progress in data*.

For this school staff, following through and sustaining their changes over time meant that they kept revisiting their goals and they made adjustments, as needed, over time. They posted their PATH in the staff room and added strategies and structures to their plan based on their data. For example, they hired some qualified teachers in addition to the teacher interns. With a change in their counsellor, the counsellor and social worker began providing whole class social skills instruction to students. They implemented restorative justice practices and developed a respect agreement with students. To add to their data on student learning, staff began assessing Grades 7, 8, and 9 students in reading and math. Staff then used this data to identify their staff development requirements. Their data began to drive their school reform agenda as it detailed their progress and confirmed their path. Intellectually, this school staff acknowledged a need to change and by tracking their progress, they grew an emotional commitment for success. They grounded their change efforts in data and used this data to show their progress.

With his sixth element, Holly says that, “the components and principles of student learning . . . are the same as those of organizational learning,” (Holly, 2003, p. 91). *Continuously improving in the self-renewing school* suggests using data to inform, educate, and create new knowledge in the school staff as a whole and also to improve individual staff learning. *Creating a data-driven school culture* is the seventh element and involves the establishment of an infrastructure that is well organized and interconnected and that uses effective team processing skills. Holly suggests that the quality of the teamwork within the school will determine the success of the change process.

By involving staff in data collection and in using that data to make change decisions, this school staff created a shared agenda for continuous school improvement and renewal. The staff took some new learning about inclusion, instruction, assessment, and behaviour and coupled it with their own student data to reform their service delivery to students. They created a data-driven school culture by continuously reviewing their data and renewing their goals. The staff decided to train students in the Seven Habits of Highly Effective Teens (Covey, 1998) and to become a UNESCO school based on their data. The school staff also used data to identify their own learning needs and received ongoing training on differentiated instruction and assessment, co-teaching and conflict resolution. The historical scan in Figure 3 lists the steps they followed.

Endings

Changes to the legislation in Manitoba have prompted some educators to examine the processes and structures of their service delivery to students in order for students with special needs to be included in regular classes. In 1998, *The Manitoba Special Education Review* identified the three major themes of (a) equity—recognizing that different students require different supports, services, and programming in order to access the opportunity to achieve success, (b) capacity—understanding that student success is grown by building on their strengths and supporting their challenges and understanding that the success of students is dependent on the capacity of the staff to provide appropriate educational programming for all students, and (c) community—knowing that a sense of belonging is a prerequisite for successful student learning and behaviour. The service delivery model that this staff now uses incorporates each of these three themes. This staff moved away from the traditional model of service delivery that exists in most Manitoba schools, and they developed a non-categorical support model where the classroom teacher is central and involved in the design of how students receive supports—a structure that is advocated by Brownlie, Feniak, and Schnellert (2006). Their model of supports and services enables all students to have success in meeting the curricular outcomes within a regular classroom.

The results of this study demonstrate that the implementation of an inclusive model of service delivery improves student success. Support for inclusion is grounded in the data herein, and I am wholly convinced that the information contained in this study will help others move to creating inclusive school environments where all students feel a sense of belonging and fulfillment from their educational experiences.

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DISCUSSION

In the last 14 years, two major systemic events related to inclusive special education in Manitoba have occurred: first, the publication of *The Manitoba Special Education Review: Final Report* (Proactive Information Services, Inc., 1998) and the proclamation of *The Public Schools Amendment Act (Appropriate Educational Programming)* in 2005. Both events temporarily focused interest on inclusive special education, but interest seemed to wane, or at least the lack of a public action plan made it seem that way. In 2012, the Auditor General's *Annual Report to the Legislature* seemed to generate a new round of interest, although to a lesser degree. We wonder what can be learned from past cycles so that interest and progress can be more sustained. We think that four issues require specific attention: accountability at the systems level, accountability at the individual student level, advocacy, and personnel training and certification.

The Auditor General's Report on Special Needs Education (2012)

Annually, the Office of the Auditor General Manitoba submits a report to the Legislature that has two purposes. The first chapter is a report on the legitimacy of the province's financial reports for the previous year. Quoting from the Auditor General's report,

The other Chapters cover project audits selected independently by our Office after taking a number of factors into account, including risk and significance of the subject matter, potential impact of our audit work, public interest and staff availability.

It is not uncommon for us to find both strengths and weaknesses in the administration of programs we examine. We provide information about both and make recommendations about how weaker practices can be improved. (p. ii).

One of the 2011 projects was an investigation and report on Special Needs Education. Chapter 6 of the Auditor General's report presents the results. In setting the context, the Auditor General's report explains that project as follows:

Manitoba Education (Education) sets standards to ensure school divisions and independent schools deliver appropriate educational programming to students who require specialized services because of their physical, sensory, cognitive, social/emotional, behavioural, or communication needs. It also provides funding and programming support for these students.

We examined Education's systems and practices for supporting the quality of special needs education, funding special needs education, and measuring and reporting special needs education performance information. (p. 249)

The Auditor General is mostly interested in whether any area under investigation establishes and monitors practices to achieve its stated programmatic outcomes. Simply put, an Auditor General's project investigates whether government money is well spent, and it assumes that the stated outcomes of the program are the basis for making a judgment. For one specific example, the Auditor General assumed that, if appropriate education is the intended outcome of government special needs funding, then the efficacy of those expenditures could be measured by whether or not the students being funded achieve the learning outcomes stated in their individual education plans (IEPs).

The Auditor General undertook a broad study of specific practices related to appropriate education in Manitoba and made 19 recommendations for improving practice. They are summarized in a section titled "What we found." Major findings included the following:

Education had developed regulations, standards, and guidelines that clearly outlined its expectations for the delivery of special needs education, but it was not monitoring for compliance. We found a low level of school division compliance with certain key standards, underlining the need for better monitoring.

Other significant areas requiring Education's attention were:

- It had limited processes to verify the information on funding applications received from the school divisions, and its documentation often did not adequately explain its funding decisions.
- Although one of Education's objectives was to maximize the outcomes being achieved for students with special needs (consistent with its objectives for all students), it did not monitor or publicly report the outcomes being achieved for these students.
- It was aware of clinician shortages and anecdotal accounts of long waitlists for students to receive clinical assessments (particularly in rural and northern Manitoba), but needed to work with school divisions to determine if students were receiving timely access to clinician assessment services. (pp. 249–250)

From our personal experience, we agree with these critiques. Of particular importance are the lack of monitoring and reporting on policy compliance by school divisions and outcomes being achieved for students. At the systems level, it appears that Manitoba Education has set standards that the Auditor General considers appropriate but has failed to ascertain whether those standards are being addressed by the school divisions that have responsibility for implementing them. At the individual student's level, the Auditor General is saying that student learning outcomes are an important measure of whether Manitoba Education is succeeding in its intended policy outcomes, but the department is not monitoring or reporting whether those outcomes are being achieved.

Accountability at the Systems Level

We mentioned above that, while Manitoba Education had mentioned policy, funding, and accountability as three areas that should be addressed together (Manitoba Education, Training and Youth, 2001b), only policy and funding seem to have received much attention until recently when the Review and Reporting Process was introduced. The Auditor General (2012), Eblie Trudel (above), and Zaretsky (above) recommend that accountability be improved. Eblie Trudel's report states that effective accountability links organizational intention with action. This raises the question of how the department could develop an effective system of accountability. Park's report (above) suggests that two components are critically required, a system of indicators and a strategy for enhancing dialogue.

As Park suggests, student accomplishment of IEP goals (and individual transition plan goals as the student approaches graduation) is a key indicator. Manitoba Education has described an assessment process that makes reporting on student accomplishment of IEP goals realistic. In the support document on developing IEPs (Manitoba Education, 2010), "Appendix O: Student Outcome Rubric" demonstrates a five-level scale for reporting on student progress toward IEP goals. This is a process that Manitoba and Saskatchewan developed and studied. The scale ranges from Level 1, much less than expected, to Level 5, much more than expected, with Level 3 being student performance at the expected level that was targeted in the IEP process. With this reporting rubric, a Level 3 is analogous to a passing grade on typical school report cards. It would be relatively easy, especially in this time of computerized reporting, for a school division to collect information about every student with IEP goals and then report the percentage of IEP goals being achieved annually. Manitoba Education could collect the same data and cumulate it for the province, perhaps for the one-third of school divisions that the department reviews in detail each year.

Most recently, Manitoba Education released a common report card for use across the province but did not fully include a reporting process for individualized IEP goals in the pilot year. Thus, it seems to be failing in its commitment to include all students in its own processes. Yet, that common report card is the ideal foundation on which to build a province-wide accountability process. If all student progress is reported with the same process, there will be comparable data across schools and school divisions. This creates a golden opportunity for eventually cumulating data related to students who have IEPs. As the department continues to roll out the common report card, we hope that it will take advantage of this opportunity to create a reporting format for students' goals as outlined in their IEPs that is not only common across all schools but also allows for collecting province-wide data on student achievement through efficient, electronic means.

In making this suggestion, we take two cautions into account. First, IEP goal setting depends on a team process, so it is likely that some goals will be high while others will be low but the two would probably balance. Even if they do not balance, the resulting data for achievement by students with special needs would allow a huge improvement over the absence of measurable goal setting and reporting that now characterizes the department and most school divisions. Two, Eblie Trudel cautions us that planning should be data informed rather than data driven. We accept this limitation. Data should be one foundation for an active dialogue, not the only source of relevant information but, nonetheless, an important source for generating informed discussion, decision making, and action.

As noted by Park, there are many other indicators that could foster discussion about inclusive special education and its impact on learning. As she points out, schools and government programs maintain a variety of information about people with special needs. However, they use diverse terminology and much of the available information is anecdotal and stored in individual student or teacher files rather than in analyzable databases. Thus, the data are not connectable from one agency to the next. Schools and government agencies could not effectively use the available information to understand educational progress and results for students with special needs, nor could other interested people (e.g., researchers, parents, advocacy organizations). Coordinating the definition and collection of useful indicators is beyond the scope of individual school divisions. Therefore, Manitoba Education, in consultation with the school divisions, Manitoba Family Services and Consumer Affairs, and Manitoba Health, bears responsibility for developing such a system.

The second component of a system of accountability is a strategy for fostering public dialogue. Eblie Trudel suggests a framework for building effective planning that would result in such a dialogue for school division planning and could also apply to a broader, provincial dialogue. Major events, such as the Special Education Review, create publicity and discussion, but what generates interest in the absence of major events? One answer seems to be relatively frequent small events. Forums, publications, well-known spokespeople, and even stunts tend to generate a certain amount of public interest. The periodic public forums by the Children's Coalition are a good example. They are not large, but are nonetheless effective reminders that some issues remain to be resolved. Another answer seems to be repeated events of moderate size. The annual Yes I Can! Awards (by the Manitoba Council for Exceptional Children) and the annual Celebration of Success (by the Manitoba School Boards Association) are two examples. Both cause discussions at various levels and include positive media attention. The Manitoba Council for Exceptional Children, the Student Services Administrators' Association of Manitoba (SSAAM), and Manitoba Education have organized provincial conferences and training events that also foster dialogue. Community Living Manitoba, coordinating with its national partners, especially Inclusive Education Canada, has kept the issue of inclusive education in the public eye to a certain extent.

However, the small and moderate events tend to generate dialogue mostly among people who are personally and professionally engaged in inclusive education. For a true public dialogue, the province requires repeated events of more importance on the public calendar. Sports and entertainment, science and arts have their showcase events. Manitoba Education attempted to create such a dialogue, beginning in 2001. It resulted in the *Manitoba K to S4 [Grade 12] Education Agenda for Student Success, 2002–2006*. According to the department's website,

The *Kindergarten to Senior 4 Education Agenda for Student Success* (the K-S4 Agenda) was an evolving, shared plan of action involving Manitoba Education, Citizenship and Youth working collaboratively with educational communities across the province. It intended to improve public education in Manitoba, particularly student learning and performance. The K-S4 Agenda was developed through public consultation during 2001 and 2002 and implemented from 2002 to 2006. (Manitoba Education, 2012)

The *Agenda's* first priority was “improving outcomes especially for less successful learners,” which encompassed learners with special needs. The department published a few follow-up reports but discontinued the process and did not generate a new agenda after 2006. In its time, though, the *Agenda* fostered a broader dialogue, and school divisions, especially, looked to the *Agenda* as a major indicator of department priorities and intentions. Zaretsky suggests that northern principals think that a department accountability system accompanied by a public department plan would help them meet their compliance requirements.

Since then, the only event that is somewhat comparable in education is the periodic release of national or international assessment results. The public interest probably stems from the opportunity to compare Manitoba results to other provinces and countries.

No provincial or school division report ever generates similar public interest, it seems. A quick perusal of websites for Manitoba Education and several school divisions suggests at least a superficial reason. Few set measurable goals and few report on student progress. Even the ones that do report on student achievement at some level, such as Manitoba Education, do not do so in a manner that generates much interest. There is no sense of what a realistic target should be, so most readers have little idea whether to worry about or celebrate the results. We suspect there would be some public interest if Manitoba Education's annual reporting of assessment results was accompanied by comparisons to and discussions about reasonable target levels of achievement. However, this has never been the case in our province.

Evidence-informed goal setting, data collection, and reporting would cause a great deal more interest than is currently the case, particularly if school divisions and the Province issued coordinated reports that included both target performances and results. Would there be a tendency to focus on areas where the results were disappointing in relation to the targets? Of course! That is our nature. It means that divisions and Manitoba Education would have to be prepared to interpret results

and show how they intended to address those that deserved attention. That, after all, is the point of having a public discussion. Our understanding of the Auditor General's report (2012) is that this sort of results and reporting would address some of the major gaps that were identified.

Finally, with regard to accountability at the systems level, Manitoba Education and the school divisions need to take the policy provisions of the 2004 *Public Schools Amendment Act (Appropriate Education Programming)* seriously. The Auditor General's report (2012) noted that not all school divisions had brought their own policies in line with the Amendment and its Regulations and Standards. The logical extension is that many, possibly most, school divisions have also not implemented the practices that are articulated in the Standards. Yet, if it had not been for the Auditor General's report, there would be no public evidence of this lack of compliance. In its response to the Auditor General's report, Manitoba Education said that it would develop monitoring processes, but it did not commit to reporting publicly. As this monograph is being written, three months after the Children's Coalition wrote to Manitoba Education, the department has also not responded to the Children's Coalition recommendation that it act on the Auditor General's report with a public consultation process and a public action plan. True accountability means putting forward credible goals and timelines and then reporting on progress toward achieving them.

Accountability at the Student Level

Inclusive special education is identified with individualized planning and programming more than any other processes. Almost by definition, when a student has a "special" need, some sort of student-specific response is required. Manitoba Education recognizes these needs by policy, which we discussed previously, and by targeted funding for special needs, counselling, clinicians, transportation, special equipment, and other supports. The department also provides direct services by funding some programs and indirect services through consultants who support students or programs. However, the department does not adequately monitor whether students are receiving the services for which the department provides funding, nor does it check whether students are achieving the learning outcomes that are anticipated when it provides supports (Office of the Auditor General Manitoba, 2012).

Manitoba Education also has not emphasized the assessment stage of IEP processes. Despite having published the "Student Outcome Rubric" as part of its support document on student specific planning (Manitoba Education, 2010), the department has not provided much encouragement to school divisions to implement the rubric. At the most basic level, inclusive education can be seen to be working when the student planning team sees that IEP goals are being worked on and achieved. However, all school divisions cannot be expected to develop effective procedures on their own. Even if that happened, it would create other problems. It would result in confusion if students move across divisions and parents have to learn another

reporting process. It would also make it impossible to collect useful data when the department eventually wants to collect province-wide data for systems-level accountability. Thus, in keeping with its rollout of a common report card, we hope that Manitoba Education will implement a common reporting process for students who have IEPs.

In addition, the IEP reporting process should not be simply anecdotal in nature. The common, province-wide report card development is meant to increase clarity for parents and students by ensuring that student progress is measured against the expectations of the provincial curriculum. The same standard should hold for students with special needs except when the learning expectations have been formally changed through the IEP process.

However, designing a common assessment and reporting system is only one part of an effective process. The department must also train members of the IEP planning team in its application. That includes making parent- and student-friendly information available. We agree with Melnychuk's contention that student decision making should be systematically fostered as students age towards greater independence. Participating in one's own IEP process, including discussion of learning progress, is a natural opportunity to help with that growth. In addition, if parents and students felt that the full IEP process was genuinely effective, beginning with true collaboration and ending with meaningful assessment and reporting, they might be less inclined to see individual student funding as the only guarantee of appropriate education for their child with special needs. It should be the IEP process, faithfully implemented, that gives parents confidence in the integrity of their child's educational program.

Advocacy

Advocacy plays an important role in furthering progress in inclusive special education. As mentioned previously, the Children's Coalition meeting of 2000 and the resulting public chagrin over government inaction was a critical event in catalyzing action on the Special Education Review. From our own personal experience, it is clear that significant momentum for improvement often requires attention from the Minister of Education and that generally results from collective advocacy of some sort.

From a purely personal analysis, it seems that inclusive special education suffers from increased inattention simply because education is more inclusive than ever before. In the 1980s, much of the discussion about special education in Manitoba centred on special schools and program clusters. In the 1990s, Manitoba Education expected school divisions to submit an Annual Division Action Plan that focused solely on student services issues. Then, as part of the implementation of the *K-14 Agenda* in the early 2000s, the department mandated that school divisions submit annual reports or updates that integrated student services within their overall divisional plans. While this was consistent with the department's endorsement of

inclusion, it also meant that the student services components of divisional planning could get lost within the overall plan. Somewhat the same result is occurring at the school and individual student levels. As special schools and self-contained classrooms disappear or diminish, there is less identity to special education. Parents do not have as much opportunity to rub shoulders with other parents whose children experience the same disabilities or special educational needs. Fewer parents identify with disability advocacy organizations. Fewer teachers, even resource or special education teachers, identify with the Manitoba Council for Exceptional Children. The likelihood of organized advocacy diminishes as membership numbers decrease.

There are four organizations that Manitoba Education consults with regarding almost all educational issues: the Manitoba Association of Parent Councils (MAPC), the Manitoba School Boards Association (MSBA), the Manitoba Association of School Superintendents (MASS), and the Manitoba Teachers' Society (MTS). On business-related issues such as funding and transportation, the department also consults with the Manitoba Association of School Business Officials (MASBO). Those organizations have the "ear" of the department. All others place a distant second in the competition to have their issues heard. From the perspective of advocacy for students with special needs, all of these organizations suffer from the same blind spots as Manitoba Education itself—their priorities are driven by those issues that affect all, or at least the majority, of students and they attend to issues related to minorities only secondarily. This is not to say that they ignore special education; in fact, we believe that they have all improved in their sensitivity to issues of diversity and responsiveness to students with special needs. However, they do not advocate on behalf of special needs with the same energy that they bring to general educational issues.

If generic educational organizations attend to special education issues secondarily and membership in special issue organizations is diminishing, who will be an effective voice on behalf of students with special needs? That question bedevils the future of inclusive special education.

Professional Training and Certification

Braun and Enns summarize the Manitoba situation in their conclusion that "According to the literature, the primary reasons for limited commitment to inclusion were inadequate teacher skills and preparation (Snyder, 1999; Winter, 2006), and poor leadership (McLeskey & Waldron, 2000). The findings from the current study support this work and reflect similar reasons for resistance towards inclusionary practice." They put it even more succinctly with their comment that "teachers need more than policy to guide them to change their practice." One conclusion is that training of professionals must improve.

The requirements for inclusive special education and diversity courses within the B.Ed program help to ensure that newly graduated teachers will have at least some preparation to effectively teach all of their students. Some issues remain. As Braun and Enns point out, there is a continuing gap between the knowledge teachers have and how they actually teach. Their commitment to fully include students with disabilities and other learning difficulties is formed by a number of factors. While the mandate for inclusion can be taught to pre-service teachers, along with a series of principles for planning and program implementation, it has never been easy to legislate attitudes. The potential shortfall between the beliefs and actions of teachers and what they are expected to do is an ongoing dilemma in education. A related dilemma becomes apparent as teacher candidates reconcile what they are taught in the faculty, their practicum, and the transition into the “real world” of schools and teaching. They must begin to make sense of what they have been taught and what they experience for themselves. Further complicating this process is the reality that experienced educators themselves still struggle with a variety of issues and realities, including the inclusion of students with special needs.

The role of certification perhaps raises more questions than can be currently answered. As noted earlier, educators can take courses and earn the Special Education Teacher Certificate from Manitoba Education. The four faculties of education offer the required courses on an annual basis, with on-campus and distance offerings in both the regular academic year and in the summer. Some school divisions have facilitated cohort opportunities for their staff to make earning this Certificate more accessible. However, the Province of Manitoba does not require resource or special education teachers to hold the Certificate, or have any specific training after the B.Ed. While various reasons for this have been suggested, the relative accessibility of the courses means that most educators can complete requirements on a part-time basis, over the course of two to three years. As Manitoba does not collect student outcome data from students with special needs, it is difficult to know if having trained teachers (classroom-based and support teachers) is helpful or not. As certification for various clinicians is governed by a variety of national bodies (unlike the case for teachers), the different professions may have differing, and potentially contradictory, standards than those for teachers. This is an area that merits further study.

Finally, Zaretsky eloquently illustrates the challenges that northern school administrators face in trying to receive relevant professional development regarding educating students with special needs, including the legislation on appropriate educational programming, regulations and resultant policies, and implications for implementation. Many of these concerns are echoed by their colleagues in the rest of the province. She states the results: “Some principals experienced confusion because of different expectations resulting from legal mandates, divisional policy requirements, advocacy group expectations, and community and school cultural presumptions based upon accepted past practices.” Including relevant information in educational administration courses at the university level and updating the content in professional development opportunities would seem to be an important initial step for ameliorating this situation.

It would be refreshing to see professional groups such as MTS, MASS, Council of School Leaders (COSL), and SSAAM work together and with university faculties and the department to describe what competent teaching and administration look like, and then re-design professional preparation, advanced education, and in-servicing to make attainment more likely. These groups are working together to consider changes to training for school leaders, and we can only hope that they will bring rigour to that process and then extend it to teacher preparation and training.

Conclusion

As we write this, it is almost 14 years since the publication of *The Manitoba Special Education Review* (1998) and seven years since *The Public Schools Amendment Act (Appropriate Educational Programming)* came into effect. With the Auditor General's report (2012) fresh in our minds, it is timely to consider what has been accomplished and what next steps are most appropriate. The three fundamental supports of Manitoba Education's 2001 discussion paper—policy, funding, and accountability—remain useful points for analysis.

We believe that Manitoba Education is the most important player with regard to inclusive special education in the province. Education is a provincial responsibility and all the other stakeholders look to the department for leadership and direction. The department has accomplished much of the promise of the Review: a commitment to inclusion, major legislation change, and a plethora of supporting policy. Manitoba Education has also reduced the negativity of a special education funding system that used to emphasize special needs labels. John remembers the Manitoba Council for Exceptional Children submission to the Special Education Review (c. 1998), for which he bore significant responsibility. Essentially, it said that the MCEC did not trust the government to accept the public will and act on whatever recommendations arose from the Review, particularly with regard to enacting legislation that mandated appropriate education for all students. The government has proved him substantially wrong.

However, the third leg of the stool, accountability, has not been adequately addressed. Five of the six graduate student reports in this monograph advocate data-informed planning and decision-making in some way (Braun & Enns; Eblie Trudel; Park; Zaretsky; Mitchell). Zaretsky concluded that "the collection, monitoring, and reporting of educational indicator data by both the school division and provincial government would be an asset in the development of financial and public policy to support the educational system where compliance gaps are evident." It can be argued that the major recommendations of the Auditor General's report (2012) suggest the same emphasis. However, schools and school divisions are not held accountable for their responsibilities toward appropriate educational programming. Most do not publicly document their supports for students with special needs. Most have not brought their policies in line with the legislation. None of them publicly report on the educational achievement of students with special needs.

Some responsibility for this shortfall can be placed with Manitoba Education because it has responsibility for leadership. It neither assesses the school divisions' performance in these areas nor publicly reports on the overall performance of education services in the province. At a systemic level, the Auditor General's report (2012) makes similar criticisms.

Thus, we recommend that Manitoba Education develop processes that foster public discussion about whether inclusive special education is working well in the province. The soon-to-be-implemented provincial report card is a good starting point. Manitoba Education should ensure that students with special needs, particularly those who have individual education plans, are included in the reporting process. In addition, Manitoba Education should collect, analyze, and report on province-wide data about whether students are achieving expected learning outcomes, including whether students with special needs are achieving their individualized target expectations. The student outcome rubric described in the department's *Student-Specific Planning* document (2010) could allow such data collection and reporting.

In the area of personnel preparation, Manitoba Education has achieved some of the recommendations from the *Special Education Review* (1998) but not others. The department has implemented "mandatory pre-service training for all teachers in topics related to special education" (p. 461) and does provide some ongoing professional development for teachers, administrators, and paraprofessionals. We note that the recommendation related to "reinstatement of minimum qualifications for resource teachers" (p. 461) has not been addressed, nor has the establishment of required qualifications for paraprofessionals. We believe both are serious omissions that compromise the quality of instruction for students with special needs.

In summary, we think that special education in Manitoba is much improved compared to its status in 2001 when we wrote our initial history. Inclusion has become the standard in discussion, albeit not always in practice. The province's legislated foundation is much stronger and some supporting documents such as the *Standards for Student Services* (2006b) provide an excellent practical foundation. Some aspects of funding and personnel preparation are improved. However, not all the recommendations of *The Manitoba Special Education Review* (1998) have been implemented, and the Auditor General's report (2012) highlighted some of those deficiencies. If the province honestly intends to meet the obligations it set for itself in 2001, a re-commitment to its action plan is necessary. Our general recommendation is that the time has come for Manitoba Education to revisit *The Manitoba Special Education Review*, analyze its actions on all of the recommendations, and develop a public action plan to address those that remain unmet. While a good start has been achieved, as it stands today, the *Review's* promise is only partially achieved.

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