

Finding a 'shady place': A critical  
ethnography of developing inclusive culture  
in an Aotearoa

New Zealand school

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*Dedicated to the memory of my grandfather Johnny Vaughn  
and to his great grandson Johnny Sutherland  
who were with me throughout in spirit*

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## Glossary

ASDAN	Award Scheme Development and Accreditation Network
BES	Best Evidence Synthesis
BEST	Behaviour Education Support Teams
BOT	Board of Trustees
CAPNA	Curriculum and Pastoral Needs Analysis
DP	Deputy Principal
EEPiSE	Enhancing Effective Practice in Special Education
EFA	Education For All
ERHEC	Educational Research Human Ethics Committee
ERO	Education Review Organisation
ESOL	English as a Second Language
GSE	Group Special Education
HOD	Head of Department
IPT	Inclusive Practices Tool
LEA	Local Education Authority
MDG	Millennium Development Goal
MOE	Ministry of Education
MOH	Ministry of Health
MSD	Ministry of Social Development
NZCER	New Zealand Council for Educational Research
NCEA	National Certificate of Educational Achievement
OECD	Organisation for Economic Co-operation and Development
ORRS	Ongoing and Reviewable Resource Scheme
ORS	Ongoing Resource Scheme
PE	Physical Education
PISA	Programme for International Student Assessment
PPTA	Post Primary Teachers Association
QUT	Queensland University of Technology
SEA	Special Education Advisor
SENCO	Special Educational Needs Coordinator
SPEC	South Pacific Education Curriculum
STOS	Specialist Teacher Outreach Service
UNESCO	United Nations Educational, Scientific and Cultural Organisation

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*Ehara taku toa, he takitahi, he toa takitini*

*My success should not be bestowed onto me alone, as it was not individual success but success of a collective*

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“Together to excellence”

# Abstract

This qualitative study is concerned with the development of inclusive values and practices in an Aotearoa New Zealand school. It focuses on the experiences of staff and leadership in the development of inclusive culture within their school. Since the launch of Special Education 2000 in 1996, it has been the stated aspiration of the Ministry of Education to create a ‘world class inclusive education system’. This thesis is part of an effort to assist schools, in the Aotearoa New Zealand context, to get closer to the aspiration of inclusion. It is hoped that this research can contribute to the sustainable development of inclusion within our schools, and that the values expressed by the ideal of inclusion can become firmly rooted in our learning communities.

The research involved embedding myself in an Aotearoa New Zealand co-educational high school as a qualitative critical ethnographic researcher. Using participatory observation and semi-formal and informal interviews I examined the experiences of a school community developing inclusive values. During an academic year the school utilised a framework for inclusive change known as the *Index for Inclusion*. The *Index* provided the framework in which the school community could explore their values, how those values were translated into practice, and to guide the change process.

My analysis drew on hermeneutic phenomenological theoretical perspectives underpinned by a social constructionist epistemology. I utilise a theoretical construct of culture, or model, in which to frame the change

process within the subject school. The tension between neoliberalism and inclusion based on social justice, and between a model of special education and definitions of ‘disability’ and ‘inclusion’ creates a dynamic that enables the co-creation of knowledge as well as possible futures. The methodology I employed was critical ethnography. Critical ethnography allows the researcher to become a participant in the project. Using a critical ethnographic methodology, the researcher/researched relationship was also a pedagogic relationship. Throughout the year of this study the staff at the subject school reflected on the core values of their school and made changes necessary to begin to align their practice with those values.

I argue that inclusion is linked to culture, and as a result, efforts to create a ‘world class inclusive education system’ must take place in the setting of the school culture. As culture is multi-layered, the change process requires time, perseverance, and at times involves pain. Change involves a renegotiation of meaning and a negotiation of expression. I argue that in a devolved educational system such as Aotearoa New Zealand, the individual school provides a ‘shady place’ in which work can be carried out to counter neoliberal policies and inculcate values of inclusion based on social justice. An ancillary argument in this thesis is that no research is neutral, and that it is an ethical responsibility of the researcher to be aware of whom their research benefits. This awareness does not compromise research; it gives research relevance.

# Chapter 1: Introduction

## 1.1 Introduction

My experience with inclusion began with the birth of my first child, a baby girl with a physical disability known as Arthrogryposis. This was part of what I told the staff team of my subject school as I introduced my reasons for being with them and the motivations behind my research. Following my daughter's birth vague impressions began to form about the nature of difference and the impact that has on the individual's place in society. During our many visits to hospital I learned that my daughter's medical needs pathologised her being (she was no longer an individual, but a condition). Moving to the United Kingdom from my native United States we soon began the school years. In the early 1990s the movement for inclusion was still in its infancy, but we had the opportunity to meet and participate in a three day training seminar about inclusion. Presented to us was a picture of a society guided by inclusive values and we were taught a variety of tools to help bring that picture alive. I believe that experience helped shape our expectations and aspirations for the next 13 years of our daughter's schooling. It seemed so natural, so easy.

In experience it was neither. The first school was abandoned in favour of another local venue, where I found out much later that we were considered the 'difficult parents'. If children at that time were classified as having a 'Statement of Special Education Needs' they received access to extra funding,

including for teacher aid support, and my daughter met that criteria. As parents, we wanted to be invited to participate in the selection of that teacher aid and to have an input in how the support was allocated. We wanted our daughter to be present and to participate at the Individual Education Plan (IEP) meetings. We wanted to participate in selecting her teacher for the following year. We wanted to encourage more thoughtful planning in school events, especially sports days. We were stretching the boundaries of what was current practice and assumptions regarding 'meaningful participation'. What we really wanted was to be validated. While in secondary school, our daughter (now attending her IEP meetings) reiterated that she neither wanted a Statement nor assistance. Her desire was finally taken on board; she was taken off the special needs register and she completed her schooling 'Statement-less' with her circle of friends. She became 'mainstream', and as a result was 'included'.

After teaching and living in the United Kingdom and United States for fifteen years I moved to New Zealand and worked for three years as a Special Education Advisor with the Ministry of Education: Special Education. It was a position that allowed me to work in many different school cultures and with many teachers, families and students. During this time I grew increasingly frustrated with trying to facilitate inclusion one student or one teacher at a time. Inclusion at this time was a common term. The aspirations of Special Education 2000 (SE2000) (Ministry of Education, 1996a) were quite explicit. In an often quoted and rather bold statement, the Government said: "The .... aim is to achieve, over the next decade, a world class inclusive education system that provides learning opportunities for all

children” (Ministry of Education, 1996b, p.5). I found that the experience of inclusion, and the degree to which inclusion could be called ‘successful’, depended on each very different school, and believed that a way to bridge this disparity was needed. While at the Ministry of Education I became familiar with the whole school framework for change, the *Index for Inclusion* (Booth & Ainscow, 2002, 2011), a tool I recognised as a potential mechanism to create more inclusive school cultures.

This thesis is not merely about one school community in New Zealand. My objective is to help create inclusive communities of learning that are welcoming for all and based on principles of social justice. These aspirations are in alignment with the aspirations outlined in the New Zealand Disability Strategy (Ministry of Health, 2001), SE2000, the Salamanca Statement and Framework for Action on Special Needs Education (United Nations General Assembly, 1994) and the United Nations Convention on the Rights of Persons with Disabilities (United Nations, 2006). This thesis is part of an effort to assist schools, in the Aotearoa New Zealand context, to get closer to the aspiration of inclusion. It is the story of a school community, as well as a researcher, working to make aspirations a reality.

## **1.2 The focus of this thesis**

Inclusion is a concept based on values of social justice (Ainscow & Miles, 2008; Ballard, 2004; Graham & Slee, 2008; Slee, 2011; G. Thomas, 1997). Those values are embedded in the culture of our communities and our schools. Inclusion will come to be seen in this thesis not as an issue to do solely with disability or ‘special needs’, but as an issue that has to do with

any minoritised or excluded group in the community or school (Berryman, O'Sullivan, & Bishop, 2010). To create an inclusive education system or more inclusive learning environments requires reflection on values. It requires exploration and 'renegotiation' into their meaning, to examining how values are reflected in practice, and experimenting and learning through shared experience in a continuous process of growth. The use of the word 'create' is deliberate. This thesis illustrates the potential of human actors to co-construct their social reality. It is through human agency that policies, such as SE2000, are interpreted and implemented, and it is through such agency that concepts and definitions, such as 'inclusion' and 'disability', are negotiated.

How does a school develop inclusive values? How are inclusive values integrated into practice? What are the processes of change within a school community during the integration of values into practice? These questions should be of vital interest to those desiring the development of inclusive education in New Zealand. However, there is no example of research in New Zealand focusing on the value-based project of creating an inclusive culture in a whole school community and the process of change that the various stakeholders of that community—parents, students, staff—experience. Inclusion is a process, concerned with the identification and removal of barriers for meaningful presence, participation and achievement of all students (Ainscow & Miles, 2008). It is a process that needs to be examined as one that impacts on all schools working within our current conflicting paradigms. This thesis looks at that process and offers an example

for other schools, school leaders and policy makers to take and use in any way that might facilitate their inclusive journey.

The research involved embedding myself in an Aotearoa New Zealand high school as a qualitative ethnographic researcher. Using participatory observation and semi-formal and informal interviews with participants I examined the experiences of a school community developing inclusive values within the Aotearoa New Zealand educational system. During an academic year the school utilised a framework for inclusive change known as the *Index for Inclusion* (Booth & Ainscow, 2011). The *Index* has been widely used and validated in various locations around the globe, but this is not a validation exercise. The *Index* provided the framework in which the school community could explore their values, how those values were translated into practice, and to guide the change process. It is hoped that the research can contribute to the sustainable development of inclusion within our schools, and that the values expressed by the ideal of inclusion can become firmly rooted in our learning communities.

My chosen methodology is critical ethnography. I am not simply studying a culture, I am participating in changing it. Research is never 'neutral', and the researcher has an ethical responsibility to recognise whose side they are on and to direct their efforts towards that cause. Does the research support the dominant interest of the *status quo*? If so, it is important to admit that that is the case, as well as articulate what those dominant interests represent. Conversely, if the research challenges the *status quo* then it is important to be honest and to articulate why. This is done in the following chapters. Schools are not neutral institutions, they are aspects of a cultural

time and place. This implies that the school is potentially an institution where the *status quo* is supported, or a place where it can be challenged (Borg, Mayo, & Buttigieg, 2002). Gramsci, for example, challenged intellectuals “to fight for the future at every level of social life, especially the cultural level” (Aronowitz, 2002, p. 116). He advised that they seek out those ‘shady places’ in which their work can take root (Jordan & Yeomans, 1995).

Sometime during my doctoral studies I attended a community talk featuring a researcher whose area of interest was the impact of oil and gas exploration in their local region. The region where I live is currently threatened by such an ‘impact’. Towards the end of the talk I asked: “Are you here to study us, or are you here to fight alongside us?” Her answer left many of us disappointed. As a researcher, I have a goal, and during the research process I utilised multiple methods in trying to achieve that goal. Here I did not create a false separation between myself as community member, or activist, or academic, or researcher. I utilised every aspect of my experience to be what Gramsci (Mayo, 1999) calls the ‘organic intellectual’, by which he referred to intellectuals who are actively involved in society. The organic intellectual does not watch the gardeners; he or she gardens alongside them, and can be recognised by the dirt under their finger nails.

### **1.3 Setting the context**

This introductory chapter examines and critiques the special education model known as SE2000. I begin by situating the study within the tension between the practical aspects of that policy and the idealistic nature of the reforms. While stating aspirations of inclusion, the reforms that created the current

educational model with a focus on resource allocation means that inclusion is potentially limited in definition, relating only to students with ‘disabilities’, as well as limited in conceptual understanding and practice. Within this critique of SE2000 the nature of disability and inclusion are explored as social constructs. The definition of terms such as ‘disability’ and ‘inclusion’ are contentious, and vary on an individual as well as a societal or cultural level. In this chapter I explore both what has been called the ‘medical model’ and the ‘social model’ of disability and relate those interpretations to current educational rhetoric and practice.

The tension between an interpretation of inclusion that sees that concept as one relating to practice and what I have identified as a trend to relate inclusion to wider issues of social justice is explored. Whereas current Ministry of Education initiatives to ‘further’ inclusion can potentially act to limit inclusion, by relating inclusion to a values-based project a link between inclusion and social justice is made. The literature review on SE2000 highlights the tension between a special education paradigm and one of an inclusion based on principals of social justice. This review places the literature of SE2000 within the context of the educational reforms known as *Tomorrow’s Schools* (Lange, 1988; New Zealand Education Act, 1989). I highlight common themes such as the neoliberal nature of those reforms, the paradigmatic tension between policy and ideal, and the need for a systemic approach and even system-wide change to create a ‘world class inclusive education system’. These themes will be further developed in Chapter Two.

Finally, in linking inclusion to social justice, essential aspects to the term ‘inclusion’ are outlined. The development of inclusion in our schools is

related to the literature regarding *Teacher Professional Learning and Development: Best Evidence Synthesis Iteration (BES)* (Timperley, Wilson, Barrar, & Fung, 2007), that argues that for inclusive values to sustainably take root in Aotearoa New Zealand schools, school community members must be given the time to reflect on their theoretical understanding of inclusion, to implement change and to reflect upon the results of that change. The conclusion of this chapter briefly outlines the contents of the thesis.

#### **1.4 Special Education 2000**

In what was heralded as an ambitious set of new policies, the Government launched Special Education 2000 (SE2000) in 1996 (Ministry of Education, 1996a). SE2000 built upon the reforms known as *Tomorrow's Schools* (Lange, 1988; New Zealand Education Act, 1989) and created the framework for the allocation of resources and the provision of special education services in New Zealand. The reforms were an endeavour to structure an equitable and efficient special education system on two levels. The practicalities of resource allocation made up the largest part of SE2000. However, another level of the reforms regarded aims and values. The stated aspiration was the achievement of a 'world class inclusive education system'. These two levels—the practical and the ideal—have formed a dichotomy that shaped the discourse of special education and inclusion in New Zealand that continues today. SE2000 provides the framework within which efforts to create an inclusive educational system take place, and as such will be examined and critiqued below.

### *SE2000 as resource allocation*

In terms of resource allocation, SE2000 adapted some existing programmes and created new ones. Recognising a growing need for the provision of special education (Ministry of Education, 1996a) SE2000 increased funding for that sector. The Special Education Grant (SEG) replaced the centrally administered Special Education Discretionary Allowance (SEDA). Resource Teachers: Learning and Behaviour (RTLB) was also created to work with students with moderate needs and their teachers. Many former special education or Guidance Learning Unit (GLU) teachers were initially appointed to this new role. By 1999 nearly all schools had access to an RTLB and were organised into clusters which shared these specialist teachers (Ministry of Education, 1999). Other reforms included the Severe Behaviour Initiative (SBI), designed for an estimated 1% of the student population that posed a threat to themselves or others or prevented their participation in their learning environment (Ministry of Education, 1998). Multidisciplinary Behaviour Education Support Teams (BEST) from Special Education Services (SES, later Group Special Education or GSE, and currently Ministry of Education: Special Education, or MOE:SE) were created to support those students and their schools. The Speech Language Initiative (SLI) sought to reach more students with communication difficulties. Additional funding was set aside for transportation.

The creation of the Ongoing and Transitional Resource Scheme (OTRS) could be seen as unique among the package of reforms, indeed, perhaps even in the world (Coleman, 2011). OTRS, later known as the Ongoing and Reviewable Resource Scheme (ORRS), and today called the

Ongoing Resource Scheme (ORS), classified children according to the severity of their needs and placed a financial value on them. A panel of national verifiers would decide whether a child qualified for services, and whether they were 'high' needs or 'very high' needs. Students verified as high needs were allocated funding for 0.1 specialist teacher time as well as a per capita financial sum. Students verified as 'very high' received funding for 0.2 specialist teacher time and a higher per capita sum. Both categories were allotted a lump sum for materials, and an amount of hours of teacher aide support would be negotiated. It was estimated that OTRS would apply to about 2% of the student population.

On the policy level, the reforms introduced as SE2000 were an attempt to create a special education system that would improve the effectiveness and efficiency of service allocation. On a practical level, the framework introduced by SE2000 remains in place today. Changes have come about with mechanisms in response to both experience and research findings. In the initial years of SE2000 the Ministry of Education commissioned high quality research to analyse its implementation and explore how to improve the initiatives. McAlpine, James, McIlroy and Meuli (1998) were commissioned to investigate the effects on students missing out on funding for the On-going Resource Scheme (ORS). Wylie (2000) used public submissions, on-site visits to schools; public meetings, meetings with relevant interest groups and organisations, and interviews and documentation to assess how the policy was working. The three-phase three-year research project carried out by Massey University College of Education was the most comprehensive review of policy implementation (Massey University College of Education, 1999, 2001,

2002). Sources of data included surveys/questionnaires, interviews, and case studies. Teachers were used as fieldworkers and actively sought the participation of parents. Independent researchers from around New Zealand participated in the project. Baseline data were collected during Phase 1 on the five components of the policy. Phase Two and Phase Three research formed a basis for comparison with that baseline data, and evaluated the evolution and consequences of policy. Recommendations made in all these studies were often incorporated into SE2000 practice.

More recently, the government initiative *Success for All: Every School Every Child* (Ministry of Education, 2012) introduced changes in response to the Ministry of Education Review of Special Education (Ministry of Education, 2010) and the Education Review Office (ERO) review of 2010, *Including Students with High Needs* (Education Review Office, 2010). Examples of initiatives include removing the review process for high needs funding (hence ORRS to ORS), additional funding for high needs, and a Specialist Teacher Outreach Service (STOS) to help ensure the teacher component to ORS is met. It is a process that has been described as ‘tinkering around the edges’ (Meyer, 1997), or perhaps more accurately as ‘structural policy’—managing demand within the available resources (Offe & Keane, 1984; Wills, 2006).

***SE2000: an ideal aspiring to be ‘world class’***

As O’Brien and Ryba note, “Whatever the type, purpose or performance of a policy, it will be embedded within the political, social and economic context of the time” (cited in O’Neill, Bourke, & Kearney, 2009, p.22). Following the

passage of the Education Act (1989) parental choice became embedded in law. The Act stated that individuals who have special education needs have the same rights to enrol and receive education at state school as people who do not. This was further reinforced by the Human Rights Act (1993) which prohibited discrimination on any grounds, including race, religion, age, sexual orientation, or disability. As well as service provision, ideals were being explored, which can at times get lost among acronyms and funding schedules.

Internationally, activists and policy makers were confronting the issue of the place of children with disabilities in educational systems. The *Salamanca Statement and Framework for Action* (United Nations General Assembly, 1994) claimed that “regular schools with inclusive orientation are the most effective means of combating discriminatory attitudes ... building inclusive society and achieving education for all” (p. ix). The conference at Salamanca brought together over 300 participants representing 92 governments (including New Zealand’s) “to further the objective of Education for All by considering the fundamental policy shifts required to promote the approach of inclusive education, namely enabling schools to serve all children, particularly those with special educational needs” (United Nations General Assembly, 1994, preface). Education for All (EFA) encompassed the Millennium Development Goal of meeting the learning needs of all children by 2015 (Rouse, 2006; United Nations General Assembly, 1990). The conference at Salamanca was called as a response to the little attention paid to inclusion in the EFA document produced at Jomtein in 1990. Ainscow and César call the document produced at Salamanca,

“arguably the most significant international document that has ever appeared in the field of special education” (2006, p. 231). The *Salamanca Framework* also stated that the development of inclusive schools should be a priority of national governments. The emphasis and enthusiasm of this language were written into SE2000. The aspiration was to create a world class *inclusive* education system.

In his analysis of special educational reform as a policy initiative, Wills (2006) sought an understanding of the intentions of policy makers. He identified two types of intention, the manifest (based on ideal or aspiration) and the latent (based on more pragmatic concerns). The manifest intention was that the education of children with special educational needs should take place in all schools. The latent intention was the introduction of new managerial approaches to reforms of education. This latent intention would always take precedence in government decisions, discussions and initiatives. However, the manifest intention expressed in the initial launch of SE2000, that of creating an inclusive educational system, introduced a paradigm shift, or perhaps more accurately, a split, in special education in New Zealand. In the heady early days of SE2000 Davis and Prangnell, two key developers of Special Education 2000, saw the Ministry of Education embracing a new paradigm (1999). As explored below, their enthusiasm may have been premature. What has been taking place is a conflict between interpretations of the word ‘inclusion’, the definition of the word ‘disability’, and the implications those definitions have on how our educational system is ordered.

## **1.5 Social constructs of inclusion and disability behind SE2000**

The movement for inclusion in education grew out of the mainstreaming or integration movement (Ballard, 1999; Kearney & Kane, 2006). SE2000 created a package of resourcing schemes with the intention of meeting the expectations of parents/carers, and students with ‘disabilities’ to attend their neighbourhood school. This linking of inclusion and integration continues to guide government and Ministry initiatives (McMaster, 2013b). Despite the aspirations expressed in the launching of SE2000, the definition of inclusion has been, at times, vague. As early as 1998 SE2000 was portrayed to parents/carers as a resource allocation scheme with more pragmatic aims. Inclusion, in practice or aspiration, is not mentioned in that document (Ministry of Education, 1998). There have been periods of practice when the word ‘inclusion’ all but disappears from the discourse. In the summary of the 2006-2011 Group Special Education Action Plan, the word is absent (Ministry of Education, 2006a), whereas in the complete plan, it surfaces once (Ministry of Education, 2006b). This instance of its usage refers to teachers and providers being ‘inclusive’ in taking responsibility to see that they support enrolment and attendance in accordance with anti-discrimination legislation (p.12). Inclusion is “about being physically present or ‘in the door’” (p.11).

The Ministry’s framing of the word ‘inclusion’ is perhaps more clearly displayed in the ERO review of schools implementation of the New Zealand Disability Strategy (Ministry of Health, 2001). The New Zealand Disability Strategy was produced with wide consultation from the disability sector, and was designed to “guide Government action to promote a more

inclusive society” (p. 3). The strategy offered a vision of a non-disabling society. “New Zealand will be inclusive,” it read, “when people with impairments can say they live in: ‘A society that highly values our lives and continually enhances our full participation’” (p.11). Objective 3 of the Strategy specifically addressed education. In providing the best education for disabled people, the government will, for example, do the following:

3.1 ensure that no child is denied access to their local, regular school because of their impairment;

3.6 improve school’s responsiveness to and accountability for the needs of disabled students; and

3.7 promote appropriate and effective inclusive educational settings that will meet individual educational needs.

The definition of disability in the New Zealand Disability Strategy reflected what has been termed a ‘social model’ of disability:

Disability is not something individuals have. What individuals have are impairments. They may be physical, sensory, neurological, psychiatric, intellectual or other impairments. Disability is the process which happens when one group of people create barriers by designing a world only for their way of living, taking no account of the impairments other people have (Ministry of Health, 2001, p.7).

Impairments become barriers due to societal constructs—such as stairs before a courthouse preventing a wheel chair user access, and the lack of a societal will to install ramps. A social model of disability moves the focus away from the individual and recognises social or political structures that exclude or marginalise individuals (Neilson, 2005; Oliver, 1990). Oliver drew a

distinction between *impairment* and *disability*. An impairment may be a physical condition or functional limitation, however, a disability is the social exclusion created by the way a society responds to individuals with impairments (Joseph, 2007). Some disability researchers today prefer the term ‘social interpretation(s)’ to more fully describe the complex societal roles in disablement but there is general concurrence that disability is a social construct. This was asserted by the Union of the Physically Impaired Against Segregation (UPIAS) when they, as Finkelstein (2001) recounts,

began debating our inferior position and asking why we found ourselves in this situation, we confronted a crude, but fundamental choice:

- either our tragedy is that the impairments we possess make us incapable of social functioning, or
- our society is constructed *by* people with capabilities *for* people with capabilities and it is this that makes people with impairments incapable of functioning.

The agreed UPIAS interpretation was that, although it may be a tragedy to have an impairment, it is the oppression that characterises the way society is organised so that we are prevented from functioning (p. 2).

Oliver (1990) points out that whereas disabled individuals have existed in all societies throughout history, the types of barriers faced by disabled individuals have varied from place to place. The extent of their disability, in other words, was based on the society in which they lived. Oliver refers to the studies of Gwaltney (1970), Farb (1975) and Groce (1975) who looked at blindness and deafness in differing societies, where the researchers found that the accommodation (or extent of disablement) of individuals with impairments depended upon their community’s values and beliefs. Gwaltney, for example, discovered that views about blindness in a Mexican village

shaped the community's response to blind members. Because of the belief that blindness was due to divine intervention, Gwaltney notes,

The cultural response was manifest in the provision of child guides for blind people, social accolades for those who were deferential to blind people, social approbrium for those who were not, and an elaborate system of informed social mechanisms to ensure the participation and integration of blind people into the community (Oliver, 1990, p. 16).

In Groce's study of deafness in Martha's Vineyard, an island community off the New England coast with a high proportion of hearing impaired, few social barriers were seen to the full participation of deaf members, as the use of sign language was widespread. Farb found a similar situation in the Amazonian tribe he studied. Because the whole tribe could communicate with sign language (and were, in effect, bi-lingual) deaf members of the tribe were fully included. A social interpretation of disability turns the focus of attention outward: it is not the inability to speak or hear (impairment) that causes exclusion (disability), but rather the society's inability or unwillingness to accommodate.

The implication in this argument is that while physical impairments can be seen to have a random distribution, disability, in contrast, is caused by social, economic or political reasons; in much the same way that poverty and standards of health are not randomly spread in society but are rather the deliberate effect of unequal distribution of resources, economic policies and practices, and ideology (Oliver & Barnes, 2012). Oliver notes that how individuals with impairments are treated can be linked with how an economy is structured. In a largely agrarian community, or a home based economy,

mobility is not of utmost importance, and as labour is largely family based, roles are allocated according to ability or convention. In an industrialised economy the demands of the labour market proscribe a need for a specific type of worker. In so doing it differentiates among individuals according to their ability to serve the needs of industry. Oliver points to the institutions that arose with the development of capitalism to cope with what became a superfluous population: the workhouses, asylums, colonies, and special schools segregating these people from the mainstream. The ideology of individualism became a core value in society, and the individual's worth was measured by their able-bodiedness and able-mindedness. A focus on the individual, such as through medicalising disability, diverts the attention from social structures which give rise to exclusion and marginalisation.

### ***Redefining disability: the medical model***

Another common feature among disability research is the rejection of a medical model of disability (Connor, Gabel, Gallagher, & Morton, 2008). When the Education Review Office (ERO) was tasked with measuring how well schools were implementing the New Zealand Disability Strategy (Education Review Office, 2003) ERO decided to borrow the definition of disability found in the Disability Classification Standard used by Statistics New Zealand:

A disability is a restriction or lack (resulting from an impairment) of ability to perform an activity in the manner or within the range considered normal for a human being (Education Review Office, 2003, p. 6).

As with the use of the word inclusion, the above definition alters meaning significantly. The definition used individualises and medicalises disability (Messiou, 2012; Neilson, 2005). It reflects a philosophical position that has variously been referred to as the medical model, psycho-medical model, biological paradigm and individual model (O'Brien & Ryba, 2005). The underlying assumption in this paradigm is that deficit is located within individual students. In this model a child receives a diagnosis of his or her impairment, which can then be used to group individuals together for instructional purposes (Graham-Matheson, 2012; Mitchell, 2010; Stephenson, 2014).

Bauman (2007) has written that by setting 'norms', we are faced with the task of segregating and excluding those that do not fit. People are set apart as other, different, abnormal. Inclusion is seen as something that is done to them or for them. Resource allocation schemes attempt to meet their 'needs' and fund their integration into 'regular' settings. Individuals are categorised, measured and given a value. When the focus of disability or impairment is within the individual, the environment or culture does not need to be restructured (Wills & Rosenbaum, 2014). It can justifiably be asked *how* an inclusive educational system is even possible within the medical paradigm, and highlights the danger pointed out by Slee (2001a), and Carrington (1999) of the philosophy behind special education subsuming the movement for inclusive education.

With industrialisation and compulsory education, according to Skrtic (Skrtic, 1991, 2005) came the problem of how to educate large numbers of students who were difficult to teach in traditional classrooms. Creating a dual

educational system allowed for the removal of any student deemed ‘difficult’ by placing them in separate locations. The resultant segregated educational system, known as special education, emerged to contain the failure of public education to enable all of its students to reach their full potential. Special education has developed into what Skrtic (1991) describes as:

Perhaps the most powerful profession in society. This is particularly true when we consider the pervasiveness and centrality of education in contemporary society and the fact that, as an institutional practice, it continues to classify more and more of its students as abnormal (p.24).

Slee and Allan see the need to ‘deconstruct’ our current ways of thinking and doing rather than simply transforming them (2001). The development of inclusion is seen as a philosophical shift away from special education thinking (Florin, 2010); involving the restructuring of school culture for inclusion to succeed and to prevent inclusion from being submerged in the existing regular education system. (Skrtic, 2005)Slee and Allan (2001) point to the current “collapse of so-called inclusion policy into a crude model of distributive justice [which] has resulted in financially driven education settlements ... [c]onsequently, inclusive schooling is reduced to pitched battles for apparently scarce resources” (p. 179). Deconstruction is seen as “daring to think otherwise” (p. 180) and creates imaginative solutions and systems. It involves critically examining the how and why we do things the way we do, including the language we use. The use of language becomes of greatest importance if one term is merely replacing another (‘inclusion’ for ‘special education’) while underlying philosophies and practices remain unchanged (Macartney, 2014; Slee, 2011, 2014).

### *ERO's conceptualisation of the discourse*

In their 2010 review of inclusion within SE2000, the Government's Education Review Office attempted to measure just how well New Zealand schools were including students. According to ERO, students with high needs are estimated to make up 3% of the school population and "have significant physical, sensory, neurological, psychiatric, behavioural or intellectual impairment" (Education Review Office, 2010, p.3). ERO explained its 'pragmatic' approach to conceptualising inclusion as 'mainstreaming'. In ERO's view inclusion was an issue of placement and practice: expecting students with high needs "to undertake all their schooling within a normal [sic] classroom setting" (p.3). This was referred to as the 'literal' definition of inclusion, and the report acknowledged that students also learn well in special units or schools (p. 3). This interpretation of inclusion framed the methods and the analysis of findings. Measured against indicators of performance, 50% of schools had 'mostly' inclusive practice, 30% 'some' inclusive practice, and 20% 'few' inclusive practices. An admitted weakness of the report was that there is no consensus of what an inclusive model looks like and hence nothing to actually measure practices against (R. Stratford, personal communication, February 24, 2012). ERO has continued to measure and has found that by 2013, 77% of New Zealand primary schools were 'mostly' inclusive (Education Review Office, 2013).

In arriving at the percentages presented ERO used indicators developed by Booth and Ainscow (2002) in the *Index for Inclusion*. These indicators were developed as a tool to assist schools in reviewing values, beliefs and practices so that they can develop a more inclusive culture. ERO

reviewers used these indicators to guide their observations, and along with self-questionnaires completed by schools, produced a Likert scale that measured performance in three areas: presence, participation and achievement. It is important to note that the indicators used were not developed for the purpose in which they were employed by ERO. Indicators in the *Index for Inclusion* are offered as aspiration statements, and each are followed by questions to “invite reflection on what inclusion might mean for all aspects of schools” (Booth & Ainscow, 2011, p. 13). By adapting key questions and applying them to a Likert scale, ERO attempted to ‘measure’ inclusion quantitatively.

While the subsequent government initiative *Success for All: Every School, Every Child* reiterated the aim of achieving ‘a fully inclusive education system’ (Ministry of Education, 2012), it is only by limiting and framing ‘inclusion’ as a form of ‘mainstreaming’ or ‘integration’, (along with creative methodology), that their goals might be met (McMaster, 2014b). The shift here is from inclusion as values to inclusion as practical acts, or a demonstration of ‘inclusive practices’ (Ministry of Education, 2012). Including students with high needs was desirable, but, “it is also important to point out that many students with high needs learn well in special schools and units that may be outside the mainstream” (Education Review Office, 2010, p. 3). Such a stance side-steps any discussion regarding developing inclusive education while ‘special’ and segregated learning environments continue to exist. The ERO report makes clear that it is only concerned with that fraction of students attending ‘mainstream’, or ‘normal’, schools. To paraphrase ERO, there were three concerns: How well do schools include those students?; what

challenges are faced enrolling and supporting those students?; and what are examples of good practice working with those students?

***Inclusion: practice and value***

The final 2010 ERO report acknowledged two independent researchers as influences on the review; however, it did not explore the paradigmatic differences between them and the Education Review Office or Ministry of Education. In the 2009 IHC publication, *Learning Better Together* (2009), MacArthur viewed inclusion more ecologically, describing inclusion as an issue of social justice and equity. Citing research findings that suggest that students with disabilities/impairments demonstrate improved outcomes socially and educationally in inclusive educational settings the report suggests that no steps have been taken in New Zealand to develop an inclusive educational system. MacArthur suggests inclusive values should be a vital part of each school. Equity, participation, community, compassion, respect for diversity and entitlement to education are embodied in an inclusive culture. Also mentioned in the 2010 ERO final report was the work of Kearney (2008) who found very strong barriers to meaningful and full participation working against inclusion. These barriers were often the result of deeply held and unquestioned values on the part of principals and teachers. The ERO report notes, “These assumptions include placing less value on the worth of students with disabilities, both as learners and as contributors to the school” (p. 6).

ERO (2010) concludes that the key to remedy this is whole school professional development related to include students with special needs, as

exemplified in *Teacher Professional Learning and Development: Best Practice Synthesis Iteration (BES)* (Timperley, *et al.*, 2007). However, by restricting the term inclusion to an idea of mainstreaming and *practice* of integration, the Ministry is faced with a conundrum. A model or framework of professional learning is most effective when it incorporates the exploration and acquisition of theoretical understanding (Franke, Carpenter, Fennema, Ansell, & Behrend, 1998). Timperley, *et al.* (2007) indicates that to sustain improvements in practice, this theoretical base, “serves as a tool to make principled changes to practice, plus with the skills to inquire into the impact of their teaching” (Timperley, *et al.*, 2007, p. 225). Research noted in the *BES* has indicated that change is more sustained when teachers, with the support of school leaders, are given time to explore ideas and integrate them into their practice. This means that to improve inclusion in New Zealand schools, teachers must reflect on the model (paradigm), or ‘discourse’ (Skidmore, 2002), in which they view the learners in their classrooms.

## **1.6 Literature on SE2000**

It is unfortunate that the ERO report did not discuss the reasons explored by Kearney of why educators or members of the community may hold specific values and assumptions. Her analysis resonates with that of all other independent reviews on the policy of Special Education 2000. Throughout the literature several themes emerge, as follows:

- Neo-liberal reforms beginning in the 1980s have introduced a marketisation of the educational system which contradicts inclusive values.

- Philosophical differences around the meaning of inclusion and definition of inclusion have inhibited the development of an inclusive educational system.
- System wide change is required if we are to create an inclusive educational system.

In their paper, *Inclusive Education Policy in New Zealand: Reality or Ruse?* Kearney and Kane (2006) questioned whether systems of inclusion could be created without dismantling exclusionary structures. They point to the reforms known as *Tomorrow's Schools* (Lange, 1988; New Zealand Education Act, 1989) which devolved funding, management and governance to local schools, and introduced market values into the educational system. Schools, now self-governing, often found themselves competing against each other for students (Gordon, 1994). Early research into Special Education 2000 confirmed this (Massey University College of Education, 2001) and supported Ballard's (1999) contention that this concept of 'self-managing schools' makes it very difficult to sustain a model of inclusion.

Wills (2006) notes that the neoliberal reforms allowed parents "to take a consumerist role and assert their choice, which ostensibly would lift the quality of education delivered to their children" (p. 192). His reference to the work of Kelsey (1997) places the special education reforms of SE2000 in the larger liberalisation programme, based primarily on values including consumer choice, outcomes, and the view of education as a private good (Higgins, MacArthur, & Morton, 2008). Within such a neoliberal context, "families participate in a competitive environment in which local schools,

special classes, special units, and special schools compete with each other for customers” (Higgins, *et al.*, 2008, p. 148). As Wills states:

For many schools the competition for student enrolments needed to maintain funding levels sufficient to meet all school operational requirements was the driver. This often meant that enrolments tied to principles of equity and inclusive education would be seen as a disincentive by the rest of the community, when they viewed meritocracy to be of greater importance (2006, p. 196).

Both the Ministry commissioned Wylie Report (2000) and the research conducted by Massey University College of Education (1999, 2001, 2002) found a trend in market values influencing principals’ reluctance to admit some students with high needs, partly due to a fear that their presence might make their schools less attractive to other families. Later research reveals that this remains a barrier to inclusion (Kearney, 2008, 2009; Kearney & Kane, 2006; MacArthur, 2009). The high and complex needs aspect of the SE2000 reforms goes so far as placing a monetary value on students qualifying for ORS funding. Coleman (2011) describes this as a ‘dowry’ parents present to school principals to encourage their child’s acceptance. Teacher aid hours are too often the ‘currency’ of transaction. Current policy, Coleman maintains, “represents the antithesis of inclusive education ... it essentially entails a reactive, deficit and categorical response” (p. 10).

Confusion within the Ministry about aims, values, and policy are causing confusion among parents, teachers and schools (Higgins, MacArthur, & Rietveld, 2006). Educational policy is shaped within a ‘special education’ model which pathologises the child in categories for the purposes of resource allocation. Children are labelled ‘special’, and hence different and separate.

Special pedagogies must be employed, specialist services funded, special locations utilised. The Government is seen as ‘winding back the clock’ and the Ministry has no clear path forward towards inclusion (Higgins, *et al.*, 2008). Policy is ‘higgledy-piggledy’ and in moving towards an inclusive education system, there is an absence of a national policy (Higgins, *et al.*, 2008). The Ministry has not only appeared confused in its aspirations and policies, it has often been at philosophical odds with other government Ministries, such as the Ministry of Disability Issues, as evidenced with their varying interpretations of disability.

Higgins, *et al.* (2008) argue that the way forward towards an inclusive educational system is through radical systematic change. This includes the development of a clear inclusive educational policy with an ideological focus on social justice and social inclusion. What is required is a project of radical reconceptualisation and restructuring of education (Kearney, 2008; Slee, 2001a). Inclusion “challenges school communities to develop new cultures and new forms of education in which all children are ‘special’” (Higgins, *et al.*, 2006, p. 32).

***Reflecting on our underlying assumptions and beliefs—a cautionary tale from abroad***

In considering the recent policy initiatives in Portugal which laid a legislative basis for inclusion in that country’s educational system, Freire and César recognised that an important barrier to the development of inclusive practices were the continued existence of beliefs and practice that could act to hinder new principles (S. Freire, 2009; S. Freire & César, 2003). While the official

policy changed, schools remained unchanged, changed slowly, or changed, but not in the desired direction. The Portuguese experience, following the enactment of their first legislation on deaf education, was one of policy initiative mandating new responsibilities without a framework or structure to assist schools in how to create a more inclusive environment. The authors identified several inhibitors to developing a more inclusive educational system as a result, namely the continued existence of older values and beliefs around disability and difference that were embedded in school and teacher culture.

Freire and César's findings were mirrored by Paliokosta and Blandford's (2010) study of three secondary schools in the United Kingdom. While legislation and policy were directed schools to develop inclusive practices, the authors found teachers were often conceptually unprepared to understand the distinction between inclusion and integration. Freire and César (2003) felt their study suggested, "that inclusion can work by removing the diagnostic paradigm associated with special educational needs and by creating a framework for teachers' lifelong learning focusing on a social justice orientated pedagogy that will empower teachers conceptually and practically" (p. 179). Without a structure or framework for guiding a school community through a transformation of cultural values, Paliokosta and Blandford found that a school's culture could remain static. In simply proscribing policy, teachers can be left feeling inadequate, threatened, insecure, not qualified enough to include learners with varying needs, and even confirmed in their beliefs that inclusion is too difficult and that those students don't belong in the mainstream.

## 1.7 Best evidence and inclusive change

Timperley, *et al.* (2007) note that when teachers discuss practice amongst themselves and underlying values are not explored, there can be a tendency to reinforce each other's deficit thinking (e.g., see pp. xxxvii, 6-15, and 120-122). Learning is characterised as involving cycles of one or more of the following processes: Cueing and retrieving prior knowledge—resulting in that prior knowledge being examined or consolidated; becoming aware of new information and integrating them into existing values and belief systems—resulting in new knowledge being adopted or adapted; and creating dissonance with current values and beliefs—with that dissonance being resolved through rejection or acceptance, and current values and belief systems being repositioned or reconstructed (Timperley, *et al.*, 2007, p. 8). Resolving the dissonance that arises when older values and beliefs are challenged requires inquiry to occur on three inter-related and parallel levels: student, teacher and school. Teachers and schools that have created more inclusive practices and cultures have explored the often uncomfortable feelings associated with that dissonance.

In reviewing examples of successful inclusion, a common process is seen to emerge, involving self-reflection followed by planning followed by acting, followed again by reflecting on the outcomes. This cyclical process is part of what made inclusive change in those schools strong and sustainable. It is a process that takes place on the level of culture, which were both interpersonal (between the members of the community) and intra-personal (taking place within the individual). Other ingredients were desire—members

of the school community wanting to improve; collaboration—working together for a shared purpose in a way that included students, parents and staff; exploring values and beliefs around the nature of difference, inclusion and exclusion; and creating a shared vision of where they wished to go and what kind of school they wished to create (McMaster, 2012).

What is needed to help deepen an understanding of inclusion is the creation of space within the school in which values and beliefs can be examined and scrutinized (Ainscow, 2005). Sustainability, the ability of change to be maintained, is a central success factor in creating inclusive school cultures. The model of professional learning, or how inclusive values and practices will be developed, must be designed so that the learning that takes place is reinforced through experience based reflection. Learning that involves developing theoretical knowledge as well as the skills to enquire into practice has been demonstrated as essential to sustaining that learning (Timperley, *et al.*, 2007). Franke, *et al.* (1998) refer to this as self-sustaining, generative change. The teachers or participants involved need to have the opportunity to continue to learn and grow. The authors propose that, “for change to become generative, teachers must engage in practice that serves as a basis for their continued growth” (Franke, *et al.*, 1998, p. 68).

Sustainable professional development was more likely when “teachers were able to engage in multiple and aligned opportunities that supported them to learn and apply new understandings and skills” (Timperley, *et al.*, 2007, p. xxxv). Activities that promote learning were seen as a key component of change. Listening to others with more expertise, discussing practice with colleagues, having opportunities to see and take part

in practice are examples given of such activities (p. xxxvii). “It appears from this analysis,” the authors write, “that teachers require similar conditions to students when in-depth learning is being promoted; that is, they need multiple opportunities to learn through a range of activities” (p. xxxvii). These features of sustainable change (time/space, exploring theory, and action) are key features in effective whole school inclusive frameworks, such as the *Index for Inclusion*, that operate on the level of culture. They are, conversely, lacking in culture auditing or measuring questionnaires currently employed by ERO and Ministry of Education (McMaster, 2013b, 2013c).

## **1.8 Social justice and inclusion**

Many definitions of inclusion consider inclusion to be an issue of social justice (Ballard, 1999; Booth & Ainscow, 2002). Aligning more with the Human Rights Act (1993), the Salamanca Statement (United Nations General Assembly, 1994), and the New Zealand Disability Strategy (Ministry of Health, 2001) inclusion is seen as a concept applying to all minoritised groups. Bishop, O’Sullivan and Berryman (2010) explain that “to be minoritised one does not need to be in the numerical minority, only to be treated as if one’s position and perspective are of less worth; to be silenced or marginalised” (p. 10). This notion of inclusion, then, breaks away from a sole association with children with ‘special educational needs’. It embraces larger social issues including the quality of participation in a social or educational setting. Values embedded in this social-political model of inclusion include supporting everyone to feel that they belong; reducing exclusion, discrimination, barriers to learning and participation; viewing differences between children and between adults as resources for learning; emphasising

the development of school communities and values, as well as achievements; and restructuring cultures, policies and practices to respond to diversity in ways that value everyone equally (Booth & Ainscow, 2011, p. 11).

In a social model of disability the focus of attention shifts from the individual to the barriers that the individual faces in their community, work place or school. Creating an inclusive education system, then, would necessitate the identification and removal of barriers. Neilson reminds us that attitudes have been shown to be one of the biggest barriers faced by people with disabilities (2005). Creating an inclusive education system would then necessitate examining the attitudes and values in our school communities. It would necessitate building school cultures that are free of barriers to meaningful participation. This work goes beyond resource allocation; it involves the 'how' of creating inclusive schools. Ballard (2004) calls for a 'cultural transformation' in ideas about disability and education in schools, a new way of thinking. Disability is seen as an issue of oppression because individuals with disabilities need to advocate or fight for rights that are otherwise taken for granted by other members of the community, such as attendance at their local school and adequate resources to make their participation meaningful. Special education is political in that it involves deciding who is 'special' and who is 'normal', as Ballard elaborates, 'Special' children belong somewhere else:

If disabled children are to be genuinely included in the mainstream of education, this cannot involve special education thought and practice. Categorising and naming children as 'special' identifies them as different from others, and different in ways that are not valued in present mainstream schools and society. What is needed for the inclusion of presently devalued disabled children is a cultural

transformation in ideas about disability, about schools and about teaching (Ballard, 2004, p. 318).

Inclusion is an ethical matter according to Allan (2005). “The success of the ethical project of inclusion will depend on how far all of the people involved allow themselves to hope, accept their responsibilities, and are prepared to do the necessary work, which starts, of course, with oneself” (p. 293). Inclusion is seen as a process of cultural review and social construction (Carrington, 1999). Booth (1996) describes two processes in the development of inclusive cultures: increasing meaningful participation in the life and curricula of the school and reducing exclusionary factors. While admitting to confusion around the term ‘inclusion’ Ainscow and Miles (Ainscow, 2005; Ainscow & Miles, 2008, 2009) build on this by offering four essential aspects to the term inclusion:

- Inclusion as a process that involves constantly searching for better ways of responding to diversity;
- Inclusion as concerned with the identification and removal of barriers;
- Inclusion as about the presence, participation and achievement of all students. Presence here refers to where a child is educated, participation is seen as a measure of the quality of experience of all learners, and achievement is about learning outcomes across the curriculum. Finally,
- Inclusion is especially focused on those children or ‘groups of learners’ who are “at risk of marginalisation, exclusion or underachievement” (Ainscow, 2005, p. 119).

Two important levers that have been identified by Ainscow and Miles (2009) for the transformations of school culture are a common sense of purpose and a common use of language.

It is vital that the discourse shaping the views of student ability, disability or potential is considered during any exploration of inclusion. Skidmore (2002) referred to this as a pedagogical discourse. How teachers understand and describe the learning of their students can reflect a ‘discourse of deviance’ or a ‘discourse of inclusion’. As Skidmore explains:

‘Discourse’ refers not only to the vocabulary that teachers use to describe their work, but more fundamentally to the underlying grammar of reasoning which can be inferred from their comments on the current organisation of provision in the school, and possible changes to that organisation which they desire or fear (Skidmore, 2002, p. 120).

A discourse of deviance would maintain that there is a hierarchy of cognitive ability in terms of which a student can be placed and the source of difficulties in learning lies in the characteristics of the learner. Support for learners experiencing difficulty should then be in the form of remediation, specially trained teachers, and an alternative curriculum. The ‘fault’ lies within the learner, not the educational organisation, curriculum or pedagogy.

Macartney (2009) argues that discourse exposes dominant beliefs and assumptions that affect interactions with learners. Using interview data, Macartney used discourse theory and analysis to explore the ‘reality’ educators ‘speak into existence’. Interview transcripts provided rich examples of how beliefs about disability (reflected in a medical paradigm or ‘charity’ model) influenced what was happening in an educational setting, which,

“without their knowledge base or assumptions necessarily being questioned or challenged ... has significant consequences for a child’s identity, learning and participation” (Macartney, 2009, p. 25). Ainscow and Miles demonstrate that teachers often navigate the hectic lesson or school day guided intuitively by a set of underlying assumptions and beliefs. The space, or time for reflection, of which the authors speak is akin to an ‘interruption’ in this process, a break in routine practice “that help make the familiar unfamiliar in ways that stimulate self-questioning, creativity and action” (Ainscow & Miles, 2008, p. 25).

## **1.9 Chapter summary**

Inclusion has proven hard to define, but by the open nature of the term we can continue to explore its deeper meanings and values. It may be more useful to look at the term inclusion as more like a spectrum than a measurable goal. While ‘inclusion’ may have began as a practice of ‘integration’ or ‘mainstreaming’ (Munoz, 2007), now it is widely recognised that to simply be in is not enough. Inclusion is concerned with the quality of participation. Inclusion has also embraced a wider interpretation which includes any members of our schools or communities who face barriers to their full and meaningful participation (Ballard, 2004). It is no longer solely a ‘special needs’ concern. Can schools be created that welcome and accommodate all members of the community? That is the challenge facing New Zealand schools. It is not about attaining Governmental or Ministry targets or goals, but how schools can restructure their practices and values to become ‘world class.’

This chapter has established the context for this project through examining the concept of inclusion, and linking inclusion to notions of social justice. This linkage in turn implies a relationship between inclusion and culture. It asserts that inclusive change is not achieved merely through altering practice, but through examining, negotiating, and re-negotiating core cultural values of school and community and how those cultural values are *expressed* through practice. I have critiqued the special educational model known as SE2000 as a vehicle for developing inclusion and reviewed the literature that supports this critique. Highlighted throughout this chapter is the contentious nature of terms such as ‘disability’ and ‘inclusion’. This contentious nature implies a fluidity in definitions and reveals paradigmatic tensions as a zone of possibility. These tensions and the possibilities offered will be the topic of Chapter Two.

### **1.10 Introduction to thesis chapters**

Chapter Two places the social construction of inclusion within the impulse for school reform. This impulse for reform has been guided by the view of the school as an important social site for inculcating values of social justice and laying the ground work, or the pre-figurative work, for building a better society. This impulse is utopian in character in that it is guided by a conviction that a better future is not only desirable but possible. By further examining the influence of neoliberal ideology I locate the school as a ‘shady place’ in which to position my efforts and indicate that the educational system in Aotearoa New Zealand offers a flexibility in which sustainable inclusive development can take place. The use of the theoretical perspectives within this thesis are justified and explained, and a rationale for the selection of Paul

Ricoeur's hermeneutics as the main analytical framework underpinning the thesis is provided. I present a theoretical construct, or model, of culture based on the work of the anthropologist, Edward Hall, which provides a framework for this research. This chapter concludes with my guiding research questions and a discussion of the primary framework used at my subject school, the *Index for Inclusion*.

In Chapter Three the methodological approaches I have used in the research are justified and discussed. The implications for the methodologies employed for the research methods and design are explored. My methods, including school selection and my changing roles during the research year are discussed. Data collection methods and how that data were analysed are outlined. Also discussed are ethical issues related to the methods used in this project and limitations of the research.

The findings chapters (Four, Five and Six) represent and interpret data from the subject school. Chapter Four frames the research through describing the context in which the research took place. Conceptual maps are offered that explore the provision of services within the school and how key values were expressed in practice. Through such a framing of the school at the beginning of the research project I am able to analyse and discuss changes that took place during the research year. The latter half of that chapter explores the experiences of staff members in working with the *Index for Inclusion* as a framework for change. The types of change encouraged by that process are assessed. The change process within the culture of the school community is the major focus of Chapter Five. With the aid of a theoretical construct, or model, for culture I argue that the development of inclusion

within a school culture is a process of continued reflection, renegotiation, and experience carried out over a sustained period of time. The experiences of the staff team and the school leader are explored in Chapter Six. It was through the change process that important elements, enablers and inhibitors of inclusion were identified.

In Chapter Seven the key research findings from this research are represented in summary form and discussed in relation to their relevance to the educational community of Aotearoa New Zealand. The use of the *Index for Inclusion* in the subject school and the potential that tool might bring to other schools will be assessed. My role as researcher and the implications of critical ethnography in educational research is reviewed. This thesis concludes with recommendations for working within the Aotearoa New Zealand educational system for creating more inclusive and socially just schools.

# Chapter 2: Situating inclusion

## 2.1 Introduction

The movement for inclusion is the response of families demanding equal access for their children to their neighbourhood schools. As discussed in Chapter One, inclusion is a concept that has moved from what was primarily a disability issue to one of social justice, taking into concern any who face exclusion or oppression. Similarly, inclusion has grown to consider the culture of the whole school and community. The strength and persistence of inclusion can be said to be the vision that inclusion explores, a vision of a future society where all are welcomed and valued, and where the values espoused by society, such as equal opportunity, meaningful democracy, and sustainability are embedded, not only in voiced aspirations, but in lived reality. This vision of the future supporting inclusion can be described as utopian. It expresses a hope that has already brought some change to our educational systems.

Utopia, in this sense, evokes a spirit of progress that is grounded in the present. The Brazilian educator Paulo Friere (1921-1997) maintains that to be utopian is “to have your feet firmly planted on the ground, in such a way that foreseeing the future becomes a normal thing. You know the present so well, you can imagine a possible future of transformation” (1987, p. 186). Freire described utopianism as a “dialectical relationship between denouncing

the present and announcing the future. To anticipate tomorrow by dreaming today” (1987, p. 187). While placing the impulse for inclusive change within a tradition of progressive development this chapter also considers resistance to such change. The current cultural hegemony in Western capitalist societies, New Zealand included, is neoliberalism. The paradigmatic tensions between a model of special education service provision and a conceptualisation of inclusion based on notions of social justice are framed within the larger ideological tensions between neoliberal values and broader democratic visions of the future. By looking at the utopian impulse behind the movement for inclusion I present the rationale for inclusive change, placing it within a tradition of educational reforms directed at co-constructing a more socially just educational system and society.

This chapter sets out a theoretical approach within the parameters of social constructionist and interpretivist paradigms. Social reality does not exist by chance, and it is not transformed by chance. Through human agency social change or social transformation is possible. I describe the hermeneutic phenomenology, or cultural hermeneutics, of Paul Ricoeur that provides the theoretical perspective through which these experiences are interpreted. Ricoeur regarded ‘text’ as a representation of experience (1976). The ‘texts’ are the stories of my participants, as well as my own story as the researcher. Hermeneutics provided the way in which to analyse the findings in Chapters Four, Five and Six. Additionally, as every ‘text’ reflects a specific cultural time and place, I utilise a theoretical construct of culture, based on the work of Edward Hall (1914-2009). Whereas culture has been written about extensively, an anthropological interpretation has been chosen here over that

of the organisational psychologists, such as Edward Schein (2010), as the focus of the research was in cultural change rather than running a more effective organisation. This cultural construct situates the change process within the tension between paradigmatic differences, as well as within the individuals of the school and the school community. This tension between neoliberalism and an inclusion based on social justice, and between a model of special education and definitions of ‘disability’ and ‘inclusion’ as discussed in Chapter One, creates a dynamic that enables the co-creation of knowledge as well as possible futures.

## **2.2 Neoliberalism in New Zealand education**

Neoliberalism is a historical and political construct and the extent to which it becomes the ‘common sense’ way of interpreting life and understanding the world will vary from culture to culture. It has been the dominant discourse in New Zealand for the last quarter century and the effects of that ideology have been well researched (Alison, 2006; Court & O’Neill, 2011; Fiske & Ladd, 2003; Ladd & Fiske, 2003; Nash, 2007; Openshaw, 2009; Peters & Marshall, 1996; Robertson & Dale, 2002; Thrupp & Irwin, 2010; Thrupp & White, 2013; Watson, Hughes, & Lauder, 2003). In essence, the adherents of neoliberal economic policies believe that the state should reduce its role in society. Pointing to the cultural and ideological features Giroux characterised neoliberalism as “a broad based rhetorical and cultural movement designed to obliterate public concerns and liquidate the welfare state” (Giroux, 2008, p. 9). It is the market, and not the state, that is best equipped to meet society’s needs. Through competition the market will sort out the efficient from the inefficient, the weak from the strong, and the winners from the losers. It will

allocate all resources, whether physical, natural, human or financial with the greatest possible efficiency (George, 1999). This is to be achieved largely through privatizing public resources, today euphemistically called ‘asset sales’, as part of downsizing the public sector.

After twenty five years, competition and choice have not raised standards, nor improved teaching (Ladd & Fiske, 2003). It has resulted in reduced job satisfaction and a de-professionalisation of teachers (Alison, 2006). Competition and choice have been shown to punish poorer communities. “When market policies are introduced into a context that is already highly stratified according to social class and ethnicity,” Watson, Hughes and Lauder (2003, p.18) conclude, “it is no surprise that schools serving the poorest communities in New Zealand are defined as the ‘losers’”. Robertson and Dale (2002) note how markets in education tend to reproduce social polarisation, as schools with the most problems have the fewest resources to deal with them—the opposite effect promised by market proponents. Conversely, neoliberal policies have come to be seen as a ‘middle-class capture’ of the education system (Peters & Marshall, 1996), as that socio-economic sector has been best able to exploit ‘choice’ policies.

### ***Limiting neoliberalism***

As equally important as examining the mechanics of the educational system created by *Tomorrow’s Schools*, as well as the ramifications of those policies, is a consideration of areas where neoliberal reforms have met resistance and have seemingly been limited. Despite adopting a ‘blank page’ approach to reforms, the Picot Taskforce could not omit social democratic impulses that

are a part of New Zealand culture (Openshaw, 2009; Picot, 1988). Examples of these cultural impulses were noted by OECD examiners (1983), remarking on a society characterised by common, person-centred values, and reflected in a commitment to comprehensive public education (open to all) (Wylie, 2012). Research has been lacking in examining these intuitive historical cultural resistors which act to inhibit neoliberalism (McMaster, 2013e). In New Zealand, a nation that, as Gordon and Whitty wrote in the late 1990s, “has probably moved further towards the implementation of neoliberal approaches to the marketisation of public educational systems than most other countries” (1997, p. 453-454), the *extremes* of neoliberal policies seen at the present time in nations such as the United States and England have not manifested themselves in New Zealand. This apparent cultural resistance to aspects of neoliberal ideology creates a potentiality for inclusive reform.

In comparing New Zealand with other western states following neoliberal agendas it becomes clear that New Zealand is no longer further along ‘than most other countries’ in their introduction. There is no ‘high stakes’ testing regimen. The modular based National Certificate in Educational Achievement (NCEA) can be seen as a bulwark against high stakes testing. NCEA has, since 2004, been the main secondary school qualification for students of the New Zealand public education system. Assessment is both school-based and external. It has been widely praised due to its criteria based assessment (opposed to standardised norms), and its flexibility (Openshaw, 2009). Similarly, National Standards, which apply to Years 1 to 8, can be seen as a massive climb down by the government that imposed them. Although the neoliberal pattern of standards followed by

testing is still threatened, the National Party has removed from its manifesto any call for national testing, a feature of several previous party platforms. The publication of results in a sort of ‘league table’, accepted as normal practice in England, is seen as highly controversial and even damaging in New Zealand (Johnston, 2012).

While the Parent Advisory Council, introduced as part of localising decision making and the running of schools, has been disbanded, Boards of Trustees continue to be an entrenched feature of school governance. Frequently the site of conflict in the early days of *Tomorrow’s Schools*, especially around the notion of ‘bulk funding’, Boards of Trustees have been seen as a powerful ally in defending community interest. The small school, with BOT support, can become a hub which the whole community can rally to support (Perrott, 2012; Wylie, 2012). This was seen with the Northland school closure carried out under a previous government (the closure of these seven small rural schools was ostensibly carried out as part of an economic rationalisation). In the case of the Christchurch rebuild following the earthquakes of 2011 and 2012 and Ministry plans to close or merge schools, community values challenged arguments based on economic rationalisation (O’Callaghan, 2013). Boards of Trustees, in the context of self-managing schools, continue to play an important role in what Wylie (2012) refers to as ‘vital connections’ between parents, teachers, school administrators and the Ministry of Education.

The New Zealand Curriculum of 2007 has been recognised as a product of the tension between social democratic impulses and the neoliberal focus of government policy (Benade, 2011). Values hold a prominent and

underpinning role in the curriculum, potentially encouraging reflection coupled with critical thinking (Ministry of Education, 2007). The Curriculum acknowledges the widespread support of values in New Zealand society, such as equity, diversity, sustainability, community participation, inclusion, integrity, and respect of self and others (Ministry of Education, 2007, p.10). The Curriculum acknowledges that values reflect not only deeply held beliefs and assumptions but that they should be integrated into the life of the school. This potentially translates as encouragement towards critically reflecting on whose values and which values are core to a school's culture before those values are 'encouraged, modelled and explored' as the Curriculum document advises. This critical reflection encourages the exploration of not just whose values and which values, but also what kind of future is desired.

### **2.3 Utopia in education**

The desire to reform is based on the belief that the present can be improved upon. Utopia, from the Greek *eutopia*, (good place) and *outopia*, (no place) is an idealised conception of society that is impossible to locate in reality (Peters & Freeman-Moir, 2006). Utopia, as it is considered here, is not about creating detailed blueprints for a model school or society. It is not, as Gramsci (1971) describes, a "longing for a ready-made society, with all its functions and elements read-made too" (p. 248). It critically questions what Gramsci calls the 'common sense' of the day, the hegemonic or dominant interpretation of a social reality that all too often drowns out alternative visions (Gramsci & Rosengarten, 1994). 'Utopia' is rather "the opening of the imagination to speculation and open exploration" (Peters & Freeman-Moir, 2006, p. 4). It is "best understood as a self-consciously developmental

process; that carries us beyond the given and taken for granted while remaining in touch with the texture of everyday life” (Roberts & Freeman-Moir, 2013, p. xii-xiii).

Every utopian vision, including inclusion, is based on the fundamental belief that human beings can take an active role in changing and shaping their reality. This agency means that humans play a role in a history that is not pre-determined (Berger & Luckmann, 1967). Gramsci held that history presents possibilities, not certainties, and, as Aronowitz (2002, p. 116) points out, “since outcomes are up for grabs, it is up to humans to fight for the future at every level of social life, especially the cultural level.” The present reality or understanding of ‘knowledge’ is not static; it is open to negotiation and renegotiation, creation and re-creation. Social reality does not exist by chance, and it is not transformed by chance (P. Freire, 1996). The critical pedagogy advocated by Freire, is, in Giroux’s words (2010, p. 2), “about offering a way of thinking beyond the seemingly natural or inevitable state of things, about challenging ‘common sense.’”

School provides an environment where education does not just take place directly through instruction but also through the social environment. To Dewey (1956, p. 18), for example, school is “a miniature community, an embryonic society”. In this ‘embryonic society’ the social medium of the school inculcates the values of a group or community (Dewey, 1966). What is required to underpin efforts to build sustainable and meaningful change was a vision of a satisfactory human life, a clear idea of the society one wished to construct (Campbell, 1992). Again, this does not imply providing a blueprint, but elucidating the values and principles undergirding a future society. It

requires a vision of an inclusive future and thoughtful approaches to achieving it, based on a critical understanding of the present. The school, seen in this way, is a site that is also contentious and far from neutral. Gramsci saw the school as the state institution par excellence for preparing children for their future roles in society (Borg, *et al.*, 2002). Education is not only transformative, but pre-figurative, laying the groundwork for potential change. The school has the potential to be the site where tensions between paradigms are investigated, where ‘common sense’ is questioned, and where values are explored (McMaster, 2013d).

## **2.4 Social constructionism**

A social constructionist perspective assumes that the members of society can exercise agency in the co-creation and interpretation of their world (Burr, 1995; Crotty, 1998; Ferguson & Ferguson, 1995). Through a social constructionist epistemology, meaning is not discovered but constructed. “All knowledge,” writes Crotty, “and therefore all meaningful reality as such, is contingent upon human practices, being constructed in and out of interaction between human beings and their world, and developed and transmitted within an essentially social context” (1998, p. 42). However, knowledge is not a fixed object, it is both historically and culturally placed, and it is constructed through human interaction with each other and with their environment.

Language is instrumental in trying to make sense of the world, and yet language/words change and take different meanings over time. The meanings carried by language are contestable. ‘Disability’, for example, can be interpreted as pathology, or it can be viewed as a social construct which

differs in interpretation according to time and place. Similarly, the word ‘inclusion’ can relate to a specific part of the population and the ‘practices’ associated with their presence, participation and achievement in a specific institutional setting. It can, alternatively, become a broad term encompassing values of social justice that relate to every sphere of human interaction. An important feature of these concepts is that their meanings are not universal, nor are they random. They are determined by the societal or cultural contexts in which they are learned.

An interpretivist perspective is concerned with the co-construction of social life and how it is experienced by the individual (Ferguson & Ferguson, 1995; Ferguson, Ferguson, & Taylor, 1992). The concepts the individual operates with are tied irrevocably with the types of societies they live in. Removing the individual from the social context in which they live would render that individual anchorless, with nothing in which to interpret or contextualise their reality. This is an important point to emphasise—the individual is not separate from their environment (culture/society). From an interpretivist perspective it is human agency, however, that ensures that, as Ferguson and Ferguson write, “individuals are not ‘cultural dopes’ passively pushed along by social structures and collective determinism” (1995, p. 107). It thus takes a critical stance towards ‘common sense’ or taken for granted knowledge. The dynamic interplay of individuals within their cultures allows not only for the construction of knowledge but the possibility of social change.

## 2.5 Hermeneutics

Interpretivism “can be understood as analogous to the literary interpretation of a particular text. For social science, the social setting or process becomes the ‘text’” (Ferguson, *et al.*, 1992, p. 298), therefore, a means of ‘reading’ that text is required. This research uses the theoretical perspective of Paul Ricoeur to interpret those stories, including my own stories as the researcher. In the human sciences the text can be seen as a book or written material, but so too can a word, an artefact or an action. The ‘text’ is a part of a culture, a product of culture, a representation of a culture; it is cultural and personal expression (Ricoeur, 1974). Ricoeur claims that “action itself projects a mode of being in the world, a mode which can only be grasped in ‘a discourse which qualifies itself as interpretation’” (Thompson, 1981, p. 63). The ‘text’ is a representation of that action, a re-enactment of event and thought through language as discourse (Ricoeur, 1976). In this way, what is spoken and what is written are textual, as both are expressions of the world, or a world.

Every text, being a reflection of *a* world, reflects a specific cultural time and place. This is also true for the researcher. A hermeneutic approach thus involves a reflection that is at the same time self-reflective. As the researcher I must also examine the context, or social background (Kogler, 2008) from which I am reading that text. This forms a hermeneutic circle between the researcher and the cultural context within which research is conducted. It involves stepping back between the part and the whole. It recognises the implications of culture on a reading of the data. And, by implication, it must recognise the time, place, and the culture, of the reader—the researcher. The primary observational and interpretive tool is the

researcher. Rather than simply dismiss qualitative research as bias, Mannheim's paradox implies that, "there can be no absolutely value-free social science" (Clark, 1990, p. 117). Admitting this, Ricoeur sought a form of validity, a striving for the *best* interpretation. Ricoeur writes that, "an interpretation must not only be probable, but more probable than another. There are criteria of relative superiority which may easily be derived from the logic of subjective probability" (Ricoeur, 1976, p. 79). The hermeneutic circle is one method to attempt to achieve the most 'valid' interpretation. In this thesis what Ricoeur refers to as conclusions that are 'more probable' are achieved through a hermeneutic analysis that teases out the cultural thread in the social form (Alexander, 2003).

### ***Critical hermeneutics***

What unites both researcher and researched is language. Language is what the group uses to 'give an image of itself', to understand its world and also re-create its culture. Language thus described appears emancipatory, and it certainly has that potential. However, the lens of language through which we explore our world can be cloudy, indeed, can be made cloudy through the cultural language of ideology. Thompson (1981) observes that "the prevailing ideology is commonly a legitimization of the status quo" (p. 148). Neoliberalism, for example, can be seen as such a force. "Neoliberal discourse and ideology" writes Jackson (2007), "can be immobilising, promoting adaptation and fatalism that leads to compromise with reality rather than transforming it" (p. 204).

In stepping back from ideology it is possible to visualise utopias (Clark, 1990). In this thesis a *critical* hermeneutics is needed to examine how ideologies reveal *and* hide reality (Roberge, 2011). It is the distorting and manipulating nature of ideologies that force hermeneutics to approach language critically. A critical hermeneutics seeks to recognise the cultural, ideological and traditional distortions in language, as well as the manipulations and power relations within the social realm. A critical hermeneutics, Broin (1988) concludes, “does not rest on eliminating possibilities of interpreting, but rather on expanding and exploring these possibilities” (p. 264). The text itself gives rise to multiple possibilities. Interpretation, then, has the possibility to be freed from ideological distortion and develops a relationship to emancipation.

In moving from the whole to the part, and the part to the whole, it is seen how those parts are integrated, but also how they are interdependent. Ricoeur writes that the underlying assumptions and beliefs of a group provide a social group a way to “give itself an image of itself, to represent and to realise itself, in the theatrical sense of the word” (Ricoeur, 1981, p. 225). Culture is a reference which ties the data together; hermeneutics is a method to tease out the underlying meaning. Here hermeneutics is more than a method. It is not just about analysis, but of self-understanding (Simms, 2003). It is epistemological in the sense that all life can be read as narrative, as text, and a reading of such provides a route to understanding the meaning of life.

## 2.6 Culture

Culture is a complex concept and difficult to define. It has been described in so many ways that a coherent understanding is made difficult (Geertz, 1973). Geertz, for instance, notes that Kluckholm (1950) used over one dozen definitions in a single chapter. Culture was “the total way of life of a people”. It was “a way of thinking, feeling and believing”. Culture was “learned behaviour”. It was “a map”, “a sieve”, “a matrix” (Geertz, 1973, p. 4-5). Culture is, of course, all of those things, but this does not bring understanding nearer. The fact that many aspects of culture are hidden is why a clear definition of culture has been so elusive (Hall, 1990). There is a surface level that is observable—the way buildings are constructed, the way people speak and act towards one another, even the way tea is served. While these surface features may be easy to notice, they too often mask the foundations upon which those ‘artefacts’ are built (Hall, 1989).

### *A model of culture*

A theoretical construct or model of culture, rather than an encompassing definition, is used in this thesis. The model employed is adapted from the writings of the anthropologist Edward Hall (1966, 1983, 1989, 1990). To handle the complexity of culture Hall explored three levels, or dimensions of culture, ranging from the observable to the hidden. Within these cultural dimensions are areas where values and beliefs are internalised, where collective negotiation takes place and is expressed. While dividing a concept as complex as culture into three neat layers is a heuristic device, the exercise

adds clarity and provides a framework so that data can be framed and interpreted.

The first layer of culture is what is seen. The second layer consists of acknowledged values, or what the community expresses as their guiding values. The third layer consists of unconscious and taken for granted beliefs, values, thoughts and feelings: our basic assumptions. Artefacts are what is seen, heard and felt. Artefacts include physical objects, such as buildings and works of art, but also the visible and verbal displays of interaction—how individuals speak and relate with one another, the language they use and the processes of routine behaviour. What occurs on this level can be observed by insiders as well as outsiders. In the school setting these overt examples include how a group structures itself, from the scheduling of the day to the provision of services and supports. What is seen on this level is the manifestation and expression of values, beliefs and assumptions shared by members of the group. Artefacts can be thick in meaning, however, it is difficult to make sense of these ‘artefacts’ without an understanding of deeper motivators such as values and beliefs (Hall, 1989).

The middle layer of this model relates to expressed values of the culture, or in this discussion, of the school community. While displaying their culture at a surface level—what is on ‘display’, what is openly expressed—this middle level can be loosely described as how people talk in the staff room. Here group values and beliefs can be shared amongst each other in a trusted environment. This layer is where real consensus is achieved and maintained among the many individual members of the community. This intermediary layer is where the conflict or tension within the group is negotiated and

renegotiated and where consensus is achieved. It is where identity is collectively explored and created.

These assumptions are frequently not clearly expressed or articulated. It is the realm of what Gramsci refers to as ‘common sense’ (1994), or what Hall (1966) calls the ‘hidden dimension’. The organisational psychologist Schein (1992) observes that these basic assumptions “are so taken for granted that someone who does not hold them is taken as a ‘foreigner’ or as crazy” (p. 25). The sharing of these underlying assumptions is what nourishes a cultural identity, forming the roots that sustain and hold it together. At the individual level, at the deepest layer of culture, the individual interprets these core values, beliefs and assumptions in an individual way. These individual interpretations are negotiated and re-negotiated as the various individuals in a culture interact, and these negotiations and re-negotiations, as they manifest at surface layers, are expressed in ways that even an outsider can sometimes see.

### *School culture as temporal*

A feature of all schools (as well as many other institutional settings) is that at a certain time of day they cease to exist below the surface level. The school is a time limited culture. Individuals come together for a set period of time—the school day—which lasts from when the first teacher unlocks the doors to when the school is once again closed at the end of the day. During the time in between the location is a hub of activity, of interactions exuding a collective personality of its own. The ability of the culture to reconstitute itself on a daily basis highlights the aspect of a shared value system. New students and

new staff are induced into this system and in turn express similar values or find it too difficult to remain within that culture.

However, although being a reflection of a wider culture, place and time, it remains its own unique expression of that wider culture within the confines of the school grounds (Prosser, 1999). As it is composed of individuals it is in essence a vibrant sphere and arena of change. Being based on shared values, the exploration of changing values makes up a re-negotiation process. Language use, for example, may change—what was once considered a humorous comment may later be considered inappropriate, racist, misogynist or disabilist. Similarly, behaviours previously ignored may later be considered wrong, such as excluding a group from shared activities. This recognition is what fuels the change process, allowing a culture to grow.

### ***Inclusion and school culture***

Zollers, Ramanathan and Yu (1999) link successful inclusion to school culture. Entering the field expecting to find educational *practices* contributing to successful inclusion, the researchers instead discovered that such practices were only one part of a cultural context that supported inclusive values. The original intent behind the work of Zollers, *et al.*, was to identify specific practices that contributed to what was considered a ‘successful model’ of inclusion. While in the field they found that practice was only one aspect of a larger school culture “that was wholly supportive of inclusion” (p. 157). The school in which they conducted their research was multi-ethnic and acted as a ‘magnet’ in attracting students with disabilities. The principal was described as having a significant visual impairment that earlier research found acted as

a model and daily reminder of the values he, as a school leader, promoted (Zollers & Yu, 1998). But perhaps more than his impairment, his democratic leadership style, the collaboration fostered between community and school, and the shared language around inclusion and belonging all contributed to a school culture that was 'inclusive'.

Corbett (1999) similarly drew a correlation between cultural values of inclusion and the extent to which a programme of inclusion can be successful. Corbett recognised that changing the culture of an institution may be a necessary step in making it more responsive to difference, claiming that, "It is about creating an institutional culture which welcomes, supports and nurtures diverse needs" (p. 58). Corbett was looking at the influence and exclusionary pressures that neoliberal values and educational reforms had on the development of inclusive education in Britain during the 1990s, especially on the values underpinning any efforts to create inclusive schools, such as equity and respect. Prior to her work in Queensland schools with the *Index for Inclusion* (a framework for inclusive change that is utilised in this thesis), Carrington (1999) echoed this when she argued that schools needed to reflect on their values and beliefs in order to create inclusive cultures. Carrington points out that culture is constructed by the beliefs and attitudes of people in a community. What is considered ability or disability, how difference is understood, is influenced by social judgements. If culture is socially constructed the culture can be influenced. She concludes that reflection on

current beliefs and practices is necessary to develop inclusive education systems.

## **2.7 Research questions**

The central aim of this research is how to create a world class inclusive education system. The primary research questions are:

- In one school, how is the concept of a world class inclusive educational system understood, enacted and negotiated within the parameters set by SE2000?
- What are the contexts within which our system of education is situated?
- What is the experience of this school community developing inclusive values and practices?
- How is the process of reflection and change understood by school staff and leadership?
- What are the limits of inclusive values and practice?
- What inhibits or enables inclusive development?

An examination of these research questions provides a context for critically assessing current practice and exploring potentialities in creating a more inclusive learning environment.

## **2.8 Utilising the Index for Inclusion**

The *Index for Inclusion* is a widely used and research validated whole school framework. This in itself does not make it the only choice for school reform in the New Zealand setting. The *Index for Inclusion* has been familiar to Oceanic researchers and schools for over a decade (Bourke, Holden, & Dharan, 2007; Carrington, 2006; Carrington, Bourke, & Dharan, 2012; Carrington & Robinson, 2006; Deppeler & Harvey, 2004; Rouse, 2006; Smith, 2005). Although it has only a very limited experience in New Zealand, its adaptability and its familiarity contribute to its choice as the most effective instrument to employ in this thesis.

### ***The Index for Inclusion***

The *Index for Inclusion* was designed as a process consisting of three dimensions: producing inclusive policies, evolving inclusive practices and creating inclusive cultures (Booth & Ainscow, 2011, p. 13). The *Index for Inclusion* was designed to be used by individual schools. Initial activities in the *Index* process involve reviewing the existing school culture through questions and indicators. The third and latest (2011) edition contains optional questionnaires for staff, parents/caregivers and children, and schools are encouraged to adapt these review aids to suit their particular location and community. Analysing the results of this process, schools can identify and prioritise areas of concern (e.g. barriers), areas of strength, and areas to act on. Action plans are developed, followed through, and reviewed for further development. The framework provided by the *Index for Inclusion* is designed to take place throughout a school year, and incorporates the exploration of

values and the examination of the theories on which practice and assumptions are based. Questionnaires are included in the *Index* as initial prompts in this process of reflection and are tailored for school personnel, parents, secondary as well as primary students. Each questionnaire, and the indicators and questions, can be adapted by each school to reflect their particular situation.

The *Index* process is designed to be a planning cycle of five phases: ‘getting started’ (initiating the process in the school); ‘finding out together’ (reviewing the school culture); ‘producing a plan’ (creating action plans around prioritised areas); ‘taking action’ (implementing the plan); and ‘reviewing development’ (which also feeds into further reflection and planning). Through reviewing the setting using the indicators and questions, school community members can collectively establish inclusive values, integrate existing initiatives or interventions taking place in the school, and start removing barriers, mobilise resources and rethink support systems. Through the reflection and action of collaborating adults and children, inclusive development will become an integral part of the school.

### ***The Index for Inclusion in use***

The *Index for Inclusion* has been a feature of English schools for over a decade, with the government distributing copies to all primary, secondary, special schools and local education authorities. The *Index for Inclusion* has been used in over 30 countries around the world and translated into thirty-seven languages as school communities try to clarify the meaning of inclusion and build inclusive school cultures and practices (Booth & Ainscow, 2011). The *Index* has been used in Denmark to help with reforms in decentralising special education and work through pedagogic or paradigmatic dilemmas

(Baltzer & Tetler, 2006). It has been adapted for early childcare settings and employed by UNESCO in developing countries. Save the Children has used the *Index* as a tool in several programmes. In Morocco the *Index* process helped community members work to improve their schools as a community resource and take notice of disabled children not attending. Changing negative attitudes among teachers and children was a priority. In Serbia, using the *Index* encouraged one school to develop flexibility in their practice to extend education to the Roma children in their locale (Save the Children, 2008; Williams, 2009).

In Australia the *Index for Inclusion* is seen an essential resource for school review and development. In Queensland alone it has been used in approximately 50 schools and educational centres. Researchers from the Queensland University of Technology working with a large primary school found that the tool, facilitated by an external or ‘critical friend’, led to enhanced collaboration, self-review, and peer mentoring (Carrington & Robinson, 2004). The *Index for Inclusion* has been used in one research project in New Zealand. As part of the Enhancing Effective Practice in Special Education (EePiSE) schools were asked for voluntary participation in using the *Index* (Dharan, 2006). Although five schools were reported to have used the *Index*, only two were involved in the case study (Bourke, *et al.*, 2007; Smith, 2005). Both schools in the New Zealand study used the *Index for Inclusion* “as a means to support school development and increase the inclusion for staff themselves” (Bourke, *et al.*, 2007, p. 64).

## 2.9 Chapter summary

This chapter has located the research within a progressive impulse for school reform. The impulse for change implies the potential ability to co-create change. It also implies a resistance to change. The existence of this tension allows for the creation of ‘shady places’ where alternative values can be developed. The school, such as the research site chosen, is one such ‘shady place’ in Aotearoa New Zealand. I outlined the epistemological and theoretical perspectives in which this thesis is situated. I presented the guiding research questions and introduced the framework for change utilised in the subject school, the *Index for Inclusion*. In the following chapter I discuss the methods I employed in data gathering and analysis and explore ethical issues relevant to this project.

# **Chapter 3: Theoretical frameworks and methodological procedures**

## **3.1 Introduction**

The Principal of my subject school asked me during our first meeting to describe the project briefly, in 25 words or less. After realising he wanted those words at that moment and not submitted later as some sort of homework assignment, I said, “Well, I will have to go back a few years for that.” I told him a story about two young parents in the early 90s, (myself and my first wife) who were speaking to a school Principal in a way much like he and I were speaking now. I conveyed to my Principal that the education process for children with special educational needs and their families can be a rough experience. It can be a constant battle, even for simple acknowledgement. I told him that, even though my children were now past school age, I was still fighting that battle. I wanted to help make schools better places, more welcoming and accommodating, places that not only responded to individual needs, but celebrated the wealth of diversity found in the local community.

In this chapter I explain the choice of methodology, critical ethnography, as the best fit for this project. I argue that an ethical ethnography is critical by nature, and the responsibility of the ethnographer is to actively participate in the shaping of a more socially just reality. The framework of a social constructionist epistemology makes this possible. I explore how a critical ethnographic methodology shaped my role as researcher in this thesis.

In the methods section I describe my processes for data gathering and data analysis. In the later part of this chapter I consider the ethical issues related to this research and my role in it and how I responded to these issues. I then consider the limitations of this study and outline the structure of three findings chapters that follow.

### 3.2 Design

Data from this project come from participant observation and interviews carried out over a one year period while I was embedded in the school community. During this year I became as much a part of the life of the school as possible, assuming a variety of roles in a voluntary capacity. I acted as facilitator and ‘critical friend’ in the utilisation of the *Index for Inclusion* as a framework for change. In this capacity I positioned myself variously as advocate and advisor and participated fully in the change process with the members of the school community.

Below is a summary of the research year outlining key activities that took place and are referred to in the following chapters.

#### *Overview of the study*

June 2013— January 2014	Preliminary meetings with Principal and negotiating access to research location.
February— March 2014	Entrance to subject school. Six week period of initial observation to build a picture of subject school at beginning of project.
March— April 2014	Initiation of Index process, building Index team. Data gathering as an Index team begins. Begin to explore creation of Student Council. Ongoing participant observation and interviews.
May—June 2014	Index group and staff data gathering/self-reflection. Stepping back from ‘driver’ role so that Principal can assume role of Index ‘champion’. Immediate changes becoming evident, such as around participation in school events. Ongoing participant observation and interviews.

June— August 2014	Collective staff exploration of inclusion and Index process including initial planning for following year. Increase awareness and language use evident in practice. Ongoing participant observation and interviews.
September— October 2014	Staff planning for Term 4 three week Year 9 and 10 activities. Stepping back as researcher to observe change process while continuing to advocate more ‘behind the scenes’. Ongoing participant observation and interviews.
November— December 2014	CAPNA process, staff informed by administration and concrete planning for following year and departmental change made possible. Ongoing participant observation and interviews.

**Table 2: Overview of the study**

***Methodology***

The area of my research is the culture of the subject school, and the data comes from the experiences, beliefs and values of my participants. A qualitative research methodology offers a way to interpret these data in an inductive style, with “a focus on individual meaning and the importance of rendering the complexity of a situation” (Creswell, 2009, p. 4). The nature of my research questions are structured so that I could gain an understanding of my participants’ actions from within their own frame of reference (Biklen & Bogdan, 2007). I am concerned with their subjective experiences. As I maintain that all knowledge is socially constructed my choice of qualitative methodology is epistemologically consistent (Crotty, 1998).

Ethnography is the qualitative strategy used in this research to study the culture of the subject school. But ethnography, as practiced in this research, is more than a tool; it is “a way of being, seeing, thinking and writing” (Mills & Morton, 2013, p. 3). My positioning as educational ethnographer requires not only continued reflexivity in my role as researcher but also attentiveness to the feelings of the people around me. Through allowing me access to their school I was ethically bound to reciprocate their

generosity, acceptance and trust. To become a part of the school involved developing and fostering reciprocal relationships (Harrison, MacGibbon, & Morton, 2001) which enabled observations to be ‘thick descriptions’ (Geertz, 1973) of the school experience.

### *Critical ethnography*

A critical ethnographic methodology (Denzin, 2003; Jordan & Yeomans, 1995; Madison, 2005; O'Reilly, 2008; J. Thomas, 1993) permitted scope for me to act as advocate and advisor in the process of change. Whereas the objective of traditional ethnography is to describe a culture, the aim of critical ethnography is to participate in changing it. The critical ethnographer feels it her or his obligation to use knowledge from research to challenge the existing structures, values, and practices that oppress or exclude members of the community. Madison (2005) writes that, “critical ethnography begins with an ethical responsibility to address processes of unfairness or injustice within a particular lived domain” (p. 5). These processes are often overlooked. It is not the case that they are invisible, but rather that we have learned not to see them and have even accepted them as the normal state of affairs (Mayo, 1999). Critical ethnography makes it an explicit aim to uncover these hidden or disguised power imbalances. Thomas (1993) writes that

[c]ritical ethnography is a type of reflection that examines culture, knowledge, and action. It expands our horizons for choice and widens our experiential capacity to see, hear, and feel...critical ethnographers describe, analyze, and open to scrutiny otherwise hidden agendas, power centres, and assumptions that inhibit, repress, and constrain. Critical scholarship requires that commonsense assumptions be questioned (pp. 2-3).

As an educational ethnographer I chose to take my place as a conscious actor and embrace the responsibility of reflecting and acting with my fellow community members (McMaster, 2014c). Freire said that reflection without action was empty ‘verbalism’, and that action without reflection was potentially worse, manipulative ‘activism’ (Crotty, 1998). Critical ethnography stands, Jordan and Yeomans (1995) note, “as the only viable research approach that will allow teachers to critically engage and pose alternatives to the conservative pull of current school reform” (p. 401). As researcher I utilise a critical ethnographic methodology to critically engage in developing inclusion within the school.

### *The position of the researcher*

Gramsci saw the intellectual as an agent of social change, participating in a cultural offensive, taking action at the level of culture to reform values that are deeply rooted in popular consciousness (Mayo, 1999). Gramsci used the term ‘organic’ to describe the intellectuals that every social class creates who give a voice and awareness to that social group. Organic intellectuals can support the dominant groups in a society and the status quo (Gramsci, 1971). Alternatively, they can challenge this hegemony, or social domination, and contribute to “intellectual and moral reform” (Gramsci quoted in Mayo, 1999, p. 41). The ‘organic intellectuals’ envisioned by Gramsci shared similar political and economic interests with those they came into contact with. Their role was not to support a status quo, but to “engage in counter-hegemonic activity” (Mayo, 1999 p. 42).

Similarly, Freire's educators were problem-posing, engaged in a critical and liberating dialogue towards a mutual conscientisation, a critical consciousness or consciousness raising that includes empowering participants to take action. To Freire, dialogue between participants was as a dance between partners, not one party performing for another, but a full enjoyment of the experience, creating a shared experience (out of love) to heighten the critical awareness of all parties. "At the point of encounter ... there are only people who are attempting, together, to learn more than they know" (P. Freire, 1996 p. 71); educator (researcher) and the people (researched) were uncompleted beings becoming conscious of their incompleteness (P. Freire, 1996). The view that emerges is that of the researcher with agency which has important implications for my position within this research. One implication here is methodological: a form of ethnography to ethically practice is a critical ethnography. The process of conscientisation is not to just observe the world, but to transform it by critically viewing the hold beliefs and values have upon it, as well as the oppressive structure in societies.

The responsibility thus placed on the intellectual and educator is due to agency. Change will only come about through critical reflection and action by individuals (such as inclusive educators) who assume the responsibility of actively building a better society. Freire writes that "One of the tasks of the progressive educator, through a serious, correct political analysis, is to unveil opportunities for hope, no matter what the obstacles may be" (P. Freire, 1992, p. 3). How this would translate to the classroom, teaching and learning environment, or research project would be through an educator/researcher with the responsibility to critically analyse how society works and challenge

learners to think critically about their social realities (S. Jackson, 2007). Freire's critical pedagogy, as Giroux (2010) describes, "is about offering a way of thinking beyond the seemingly natural or inevitable state of things, about challenging 'common sense'" (p. 2). Critique, for Giroux, is a "mode of analysis that interrogates texts, institutions, social relationships, and ideologies as part of the script of official power" (2011, p. 4). This understanding of critique has guided the methodology, methods, data collection and analysis of this thesis.

### **3.3 Methods**

Because ethnography was chosen as the most appropriate methodology for this study, I endeavoured to become as much a part of the life of school as possible in order to be an effective participant observer (Brewer, 2000). As a participant observer I was in close association with the members of the subject school, maintaining the fine balance between 'outsider' and 'insider'. This was achieved through the building of relationships and offering to help in the school in any way, accompanied with a continuous reflexive attitude towards my role and actions within those relationships (Foley, 2002). In the following sections of this chapter I describe school selection, the role of myself as researcher and activist, data collection and data analysis methods. I situate my research within the ethical obligations outlined by the University of Canterbury Educational Research Human Ethics Committee, and consider ethics relating to reflexivity. After considering the limitations of this research I outline the structure of the three findings chapters that follow.

### *School selection*

In selecting a school for this project I first utilised networks within the regional Ministry of Education, Special Education (MOE:SE) located in my home city. Having formerly worked at MOE:SE I contacted a former colleague to enquire about schools in the locale that might be amenable to working with me. The criterion I set for a potential subject school was explained. As this was a project that ideally involved the whole school community, the research location would of necessity be a school that had a strong desire to reflect on its own values and develop more inclusive practices and minimise barriers. I felt that a location in my own community would diminish the ‘otherness’ I inherently possess as a researcher (Jordan & Yeomans, 1995) and accentuate my role as critical participant (Gramsci & Rosengarten, 1994). My preference for research site was a secondary school due to the complex nature of such sites and the difficulty often found or expressed by those interested in developing inclusive practices. Criteria for school selection were as follows: that the school was interested in using the *Index for Inclusion* to develop more inclusive practices; was of a size that ensures diversity of population (e.g. more than 500 students); and contained within its population students currently on the Ongoing Resource Scheme (ORS). The latter was important in placing the project securely within the SE2000 model.

My former colleague discussed the idea with a local Principal and arranged a meeting between us in the middle of the year prior to my research year. This introduction was very important. Understanding the local culture (I had lived in the area for several years) I was very aware of the importance

of having a trusted known person to ‘vouch’ for me. During my first meeting with the Principal I outlined the nature of my project. The phrase that won him over to my research project was, “This is something that I would like to do with you, not to you” (*fieldnotes: interviews*). He accepted the copy of the *Index for Inclusion* I offered and agreed to work with me. Over the following weeks we met one more time, a meeting in which I was introduced to a dean and was able to elaborate on the *Index* process. In the month prior to the beginning of the new academic year (in which I would be researching in the school) the Principal and I met twice again, meetings that established his and the school’s commitment to work with me and provided early insights into what he expected to achieve. We began planning the initiation of the process in school, exchanging questions and clarifying roles. It was an important part of building trust between us. Our relationship was openly reciprocal. While I was using his school for the purpose of doctoral research and the production of a thesis, he was utilising me and the *Index* for school improvement (and similarly, our mutual friend at the Ministry of Education was ensuring that the school looked at improving its service provision for students with ‘special needs’).

### ***Roles as ethnographer***

During the research year I spent every term day at the school which enabled the collection of rich sources of data. The principal offered me the use of a small office located between his and a Deputy Principal’s office. This space became a base where I could set up my laptop and keep any papers while working at school. I tried to minimize my time in the office in order to develop relationships in the school. Being without a formal (paid) role in the school

meant I had to find roles, offering to assist in any way needed. In this manner I developed relationships based on mutual respect. Harrison, MacGibbon and Morton (2001) highlight the importance of reciprocity in research, in not just sharing data but in relationships with participants. “To get good data—thick, rich and in-depth, intimate interviews—we are enjoined to attend to reciprocity in our method. Reciprocity, the give and take of social interactions, may be used to gain access to a particular setting” (p. 323). This ‘role assuming’ was done in many ways, from tutoring reading, co-teaching specific subjects, helping with extracurricular programmes or sports, and volunteering in the life of the school in different capacities. My participant observations took me to every department, and I made an effort to meet every staff member, teaching and auxiliary.

### *Changing roles as ‘critical friend’*

In facilitating the process of the *Index for Inclusion* in the subject school I assumed a variety of roles that expressed the needs of the project at its various stages. Each of these roles will be described briefly below. The experience of the school in utilising the *Index for Inclusion* is considered in Chapter Four.

#### *Inclusion advocate*

During the primary stage of the research I assumed the function of an ‘inclusion advocate’. While the first six weeks of the year was spent collecting data and familiarising myself with the school, after that initial period I spoke to the staff during a whole staff meeting describing the *Index* process. After this introduction several changes became evident. The first was the general understanding of myself as a sort of ‘inclusion advocate’. During the meeting

I made explicit my research aims, as well as my personal experiences with inclusion and exclusion. I outlined why I was working with them and what I was asking from them. Following the meeting my actions became more overtly advocacy and I utilised opportunities, such as the whole school sports day, to begin to advocate for the participation of the ‘special needs’ unit students in an event that they had not previously been a part. Actions during this period also involved encouraging others to advocate for wider student participation, such as recruiting a dean to help ensure that the unit students would attend that sports event.

#### *Index advocate*

Following the staff meeting where I outlined the *Index* process, I also became an advocate for the process—an ‘*Index* advocate’. My activities during the first two phases of the *Index* process were very proactive in ensuring that the process took root and was able to grow in the school environment. This included maintaining interest in the *Index*, offering copies of the *Index for Inclusion* and spending time developing team relationships. A great deal of my *Index* advocacy was directed towards the Principal. In working with other planning team members I was considering who might be best placed to act as a team leader, or even as co-leaders. The leading candidate for the role of leader or ‘champion’ repeatedly returned to the individual who invited me into the school—the Principal. My stepping back from a leadership role in the *Index* process (a role that was so important to initiating that process) was deliberate to ensure the full ownership of the process by the school staff and help ensure maximum sustainability. During a whole staff meeting where teachers explored the definition of inclusion and began the *Index for Inclusion*

planning stage I was purposefully absent. In this way I became the ‘critical friend’ to the process rather than the driver. This role was found to be very useful in other examples of *Index* use (Bourke, *et al.*, 2007; Carrington, *et al.*, 2012; Carrington & Robinson, 2004).

#### *Inclusion Advisor and Mentor*

As my time in the school was much more extensive than in any previous New Zealand experiences with the *Index*, the nature of my role changed as the process continued. As the Principal took much more leadership in the *Index* process, and as other key staff members were encouraged to advocate more for change, I stepped back from the field of change. I continued to advocate; however, this would be done in a less direct manner and in a way that provided others an opportunity to experience and be seen as advocates. This was done through modelling advocacy, offering advice or information, commenting on a situation to raise awareness or encourage a staff member to take action. One such type of advocacy included discussions with the Principal. These discussions became regular fixtures of the week, as the principal explored ideas with me or I put forward ideas to him. At times I became mentor, at times a sounding board, and at times a prompt to action through using the opportunity to pose provocative questions regarding specific practices or to query promised actions. During this phase of the research I sought to minimize my active and visible roles. This also gave me an excellent vantage point to observe how change was being experienced within the school.

### **3.4 Data collection**

Data were collected in two primary ways: participant observation and the interview. A total of ten months was spent at the research location, collecting data in participant observation field notes and interview transcripts. These stories constituted the text that is the experience of my research participants. Below is a description of the methods used to collect the data that constitute that text.

#### ***Field notes***

Mills and Morton (2013) remind researchers that the literal meaning of the word '*ethnography*' is *writing the people*. Ethnography combines being, seeing and writing; it combines researching and writing. Field notes made up a major and vital portion of my data collection. These notes provided a rich source of data that reflected not only my collection of information, but the evolution of ideas, the development of relationships, the planning or strategising (and observation) of the process of change. My field notes were also in an important way a refuge. These notes were my place to "let it all hang out", to write freely and honestly about all aspects of my research, a place to, as Biklen and Bogdan (2007) advise, "confess your mistakes, your inadequacies, your prejudices, your likes and dislikes" (p. 122). As such they were written only for me, and they were seen only by me. These field notes documented my interaction in the cultural life of the school as a participant observer, as well as my role as agent of change.

How these field notes were written up evolved through experimentation during the first weeks of the study. On one day, for example,

I decided to wait until returning to my office at home to type up daily notes. With this practice I spent too much time trying to recall important events and interactions of the day and potentially missed more than captured (*fieldnotes: participant observations*). What became the preferred, and in my view, most effective method was to utilise the office space given to me by the Principal and return when opportunity presented to type up relevant thoughts and experiences. In this way I was able to utilise any ‘down time’ at school, such as gaps in my volunteer schedule. By the end of the school day I was able to take to my home office a good quantity of data to reflect on and add to.

### ***Interviewing***

I selected several methods of interviewing and transcribing during this research. I conducted 112 interviews with 42 staff members, which included five individuals working with the school in an itinerant manner, such as Special Education field staff and Resource Teachers: Learning and Behaviour (RTLB). Fourteen of these interviews were recorded. Subjects for these interviews were identified as key participants and willingly agreed to that format. These included the school Principal, a former Principal, the HOD for learning support, the HOD of the Maori Department, the school Counsellor, a teacher union representative and the current Te Kotahitanga<sup>1</sup> facilitator.

In the case of the Principal and HOD these interviews were professionally transcribed. This service was recommended by another

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<sup>1</sup> Te Kotahitanga literally means ‘unity of purpose’. Here it refers to the educational reform project developed by Bishop and Berryman which aims to improve the educational achievement of indigenous Maori students in mainstream secondary schools.

postgraduate student and work did not commence until a client agreement was signed. I took the advice of Glesne (1999) regarding this service. “Whatever means can be afforded to minimise the agony of transcribing tapes ... should be seized” (p. 79). However, my earlier agreement with Glesne was tempered as my research continued. After the initial professional transcriptions I ceased using that service as the inconvenience of painstakingly transcribing interview recordings was counter-balanced by the value of personally re-hearing each word as it was spoken and transcribing each interview myself. To transcribe some interviews verbatim key phrases or sentences were jotted down while listening to the interview on my recorder and coded emergent themes. Added to this transcript would also be my analytical comments.

#### *Semi-formal interviews*

Bogdan and Biklen (2007) remind us that, “Qualitative interviews are, of course, supposed to be open-ended and flowing” (p.131). Semi-formal interviews took the form of guided conversation, where I encouraged the participants to talk in the area of interest (Rubin & Rubin, 1995). Any questions I came to the interview with were usually in the form of key words or phrases used as prompts. These prompts reflected the purpose of each interview. For example, when interviewing a previous school Principal, the prompts were around school history, what he felt were core values at the time, and his feelings regarding the direction of the school. Another example is the head of the Maori Department, and although coming to this interview with prompts, her willingness to speak about her department and her views made recourse to these prompts largely unnecessary. At the end of the year

interviews were conducted regarding impressions of the research year, started simply with the question, “How was your year?” These interviews were often ‘flipped’, with the participant enquiring about my plans for the following year, and my own impression, which in turn became prompts to elicit reflection from the participant.

In these situations participants were less averse to the presence of a recording device and these recordings were transcribed in full or were transcribed and coded according to what Merriam (1988) refers to as an ‘interview log’. This type of interview, with ‘guiding’ questions and perhaps a recording device, was a feature of initial research (participants sharing their perceptions of where the subject school was at as I entered ‘the field’) and as my time at the subject school was coming to a close (exploring how participants perceived the past year).

#### *‘Opportunistic discussions’*

Other interviews were conducted informally. Informal interviews consisted of discussions and explorations of the personal views and experiences of my participants (Kvale, 1996). Interviews were ‘opportunistic’, dependent on what was going on in the immediate area. In many situations these informal interviews were seen as opportunistic means for staff to share with me, without the formality of a recording device. After an early experience where my offering to be a confidant and utilising a recorder caused a participant to show great reluctance, I was more cautious in my use of that device. Without the formality of a recording device this participant was much more willing to speak openly with me, which we did on several occasions.

Notes from these interviews were collated in field note form for later analysis. Informal interviews made up the bulk of such person to person sharing of information. Participants were much more inclined to share their impressions and feelings spontaneously, and reflected friendly chats that were reciprocal in nature. At these times I as the researcher could also assume the role of confidant, or discuss with the participant my own emergent analysis for their comments or insights. These ‘interviews’ were conducted in this informal manner, what Paliokosta and Blandford refer to as ‘opportunistic discussions’ (2010). ‘Opportunistic’ discussions with participants occurred in a variety of contexts. These contexts could have been a quiet time in the staff room, a walk with students and their teacher aides, breakfast after an early morning workout with students, or planning literacy interventions with teachers. The nature of my place in the school afforded many diverse opportunities to ‘opportunistically discuss’ or to relate with those at the subject school. As my role at the school transitioned from ‘visiting doctoral student’ to that of a colleague and friend, ‘informal interviews’ or ‘opportunistic discussions’ became a way of relating with those around me, a way of exploring their lived experience of not only the change process, but even the effect of my presence at the school.

My interactions with students were all conducted in such an informal manner. In the variety of roles I took while at school I interacted freely with the student population. Many lunch times were spent eating or playing with students. My volunteer role in an early morning positive youth development programme (Hamilton, Hamilton, & Pittman, 2004) created bonds through hard physical challenges. Co-teaching subject specific classes and co-

managing the student council gave me opportunity to build relationships with students. While this thesis focusses on the experiences of the staff at the school, these interactions added a depth to my understanding of the school culture.

The majority (70 percent) of ‘interviews’ were conducted in this informal manner. ‘Interviews’ were followed up with a review or ‘member checking’ (Biklen & Bogdan, 2007), of transcripts or summarised field notes, during which time participants were invited to add or clarify information. Again, even this sharing was more a form of relating than presenting. I could return to a participant and continue a previous conversation. On one occasion I left a situation somewhat disconcerted by my participant’s response and was able the next morning to take advantage of a quiet moment to try to clarify what I perceived had happened. The result was a much deeper understanding of the importance of culture in the interaction of staff at the school and how that might impact inclusive change.

On this occasion I was following up an earlier suggestion of this staff member for a student from the special needs unit to attend the ‘whanau’ form class. The ‘whanau’ form class is made up of students who came from a Māori immersion setting and is based in the school wharenuī. Asking this staff member if the student had begun coming to the class, she answered that he had not been brought. “You realise he isn’t going to be delivered, you’ll have to collect him,” I responded, at which point this staff member grew upset and said, “I’m not gonna do it, I’m not gonna do it!” (*fieldnotes: interviews*). That next morning my apology (for I had thought I had caused upset) was interrupted, and the staff member explained that her collecting the student

was culturally offensive, it was *e he*, not right. It would be inappropriate in her culture to bring him. He should be brought, and then formally welcomed into the group. Following my caution to her that waiting on the action of others (who may not be pro-actively inclined) might stop this student's attendance we were able on this occasion to explore other possible avenues, such as a pair of students from the whanau form class formally introducing the student to the whanau form class.

Here is an example where methodological terminology may become blurred. Semi-formal interviews, informal interviews, 'opportunistic discussion'—qualitative research is open ended and flowing. It is concerned with personal experience and perception. It is based on personal and reciprocal relationships. It is based on trust. Yet it still involved what Kvale (1996) calls craftsmanship; it was in no way ad hoc. "In order to develop the qualitative interview as a form of research it is necessary to go beyond the dichotomy of all method versus no method" (Kvale, 1996, p. 105). As a part of an ethnographic methodology the 'interview' required being aware of my state of mind, what I brought into 'the field', as well as being aware of the state of those I moved among.

### **3.5 Data analysis**

The analytical procedure I utilise is a threefold process which Ricoeur (1991) calls 'Mimesis(1)', 'Mimesis(2)', and 'Mimesis(3)'. Mimesis(1) is *prefiguration*. Prefiguration is the pre-understanding that I as the reader or researcher bring to a text/the data. It is the practical understanding gained through my own life experience that enables me to understand what is

happening. It is *how* I make sense of the text. Mimesis(2) is *configuration*, which is a form of emplotment, organising the various elements of a narrative into relation with each other, or into “an intelligible whole” (Ricoeur, 1984, p. 65). Configuration is what stops the text from merely being a series of incidents stuck together. As Simms (2003) points out, meaning is attached to a story because it is going somewhere, the incidents are related in some way. Mimesis(3) refers to *re-figuration*, which is “the intersection of the world of the text and the world of the hearer or reader” (Ricoeur, 1984, p. 71). Once again a hermeneutic circle emerges, what Ricoeur considers a ‘healthy circle’: we bring understanding to a text and the text deepens our understanding, which we then bring back to the text.

Ricoeur (1976) explains this elsewhere when considering the dialectical relationship between understanding and explanation. He explains the dialectic as a move from understanding to explanation, and then as a move from explanation to comprehension. The first time, understanding will be a naive grasping of the meaning of the text as a whole. The second time comprehension will be “a sophisticated mode of understanding, supported by explanatory procedures ... Explanation, then, will appear as the mediation between two stages of understanding” (Ricoeur, 1976, p. 74-75). The writings in my field notes can be analogous to that ‘naive grasping’, based on what I have brought to the context (pre-figuration). My analytical memos and vignettes attempt to explain, or find the meaning (configuration) of the evolving narrative. Finally, a ‘more sophisticated mode of understanding’, (a re-configuration) emerges as academic papers and the thesis. This circular movement provides an interpretation, claiming a validation in that it is the

most probable of possible interpretations. This hermeneutic circle enables a deeper understanding of the individual participants. Performing a double hermeneutic through the reading of my own writing, my understanding of myself is deepened. The data from the field in its varied forms became the narrative, the text, to interpret.

### *Codes and themes*

As set out above, my fieldnotes were an invaluable source of data. Following the completion of each week in the field I would print off the week's notes to read as a whole. As I read, lines became highlighted, words circled, margins written in. Letters used as codes stood out brightly: 'M' for methods, indicating entries that elaborated aspects of my research, including how I felt about it; 'A' for activist where I or a participant were deliberately acting on another's behalf; 'CI' highlighting what I considered to be a possible critical incident. 'SC' referred to student council; 'IP' indicated the *Index* process; 'P' was related to areas where I participated in school life; 'I' indicated with whom and when an interview took place. As the weeks progressed the number of 'codes' increased (see Appendix 8 for example of fieldnotes). These codes were then collated and acted as an index, making fieldnotes quickly and easily accessible. Each interview, for example, listed the date, participant, topic of discussion and format of the interview. As emerging themes were turned into analytical memos, my indexed fieldnotes became indispensable. Interview transcripts, when not incorporated into my field notes, were treated in a similar fashion.

While these codes were important for collating data, the notes and circled words also became themes which provided the clues for interpretation. These themes were akin to what Strauss (1987) called ‘open coding’, used to get to know the data, “to begin to make sense of its complexity, and decide what aspects of it are meaningful for your study” (Mills & Morton, 2013, p. 119). The themes listed in margins or circled or highlighted phrases were akin to pieces of a puzzle. In ‘sorting and sifting’ (Lichtman, 2006) through these pieces they were arranged into coherent pictures, into meta-themes that gave insight into the social reality of the school. It was in this way, as Coffey and Atkinson (1996) suggest, that “the analysis of narratives can provide a critical way of examining not only key actors and events but also cultural conventions and social norms” (p. 80). The aim of this exercise was not reductionist but rather the building of a story/narrative, to seek meaning in the shared culture of the school. By seeking themes in the narrative of the school I was, as Polkinghorne (1988) expresses, using the narrative “as a lens through which the apparently independent and disconnected elements of existence are seen as related parts of a whole” (p. 36). My field notes and transcripts captured and told these ‘disconnected narratives’. The themes provided a means to weave these stories together into a meaningful interpretation.

### *Analytical memos*

The form my interpretation of the data took was the analytical memo (Biklen & Bogdan, 2007). Whereas Biklen and Bogdan refer to memos as ‘think pieces’ usually attached at the end of a set of notes (p. 122), I preferred to keep my analytical memos separate from my field notes. Each analytical memo focussed on emerging themes; they described the picture emerging

from the themed field notes and transcripts. It was through the analytical memo that I configured the data into ‘an intelligible whole’. These memos were written in an iterative manner. The first memos described the context of the school in terms of history and service provisions. Early thematic maps of the school created in this process were shared with the Principal and influenced his own view of the school. While sharing emergent themes, however, my analytical memos themselves were kept private. Some memos later became incorporated into chapters on findings. Others were necessarily re-edited to reflect a deeper understanding before re-configuration, or incorporation into the thesis or inclusion into an academic paper. The writing of the memos also allowed me practice in writing in a manner that both protected my participants’ anonymity and was sympathetic to them.

Prior to leaving the field these analytical memos constituted 45,000 words of analysis concerning 18 areas. These areas ranged from a description of the school, core school values, the *Index* process, the process of change, elements of inclusion and inhibitors of inclusive change. The first stage was, as Mills and Morton (2013) point out, “immersion: spending time with one’s research materials through reading and re-reading transcripts, diaries, fieldnotes and artefacts” (p. 116). These memos were used to analyse material and generate narrative (Mills & Morton, 2013). They described both entering the field, methodological and ethical considerations, as well as exiting the school and my continuing relationship with staff. Analytical memos were, to use the analogy of the puzzle once again, the picture emerging from the ‘sifting and sorting’ of individual pieces.

### ***The vignette***

Although the saying, “a picture is worth ten thousand words” was fabricated by an advertising executive (Lichtman, 2006, p. 175) there is a good deal of truth to it. Images are a powerful medium, representing merely a moment but conveying powerful messages. In my analytical process I inverted and altered this saying, using words to capture an image. Vignettes captured a moment in my research and presented it as a brief, albeit powerful, narrative. In presenting a single moment or episode the vignettes conveyed a concept or idea, such as my actions as a researcher, a deficit discourse observed in a classroom, or a particularly difficult interaction with a participant. After changing the names of any participants mentioned, some of these vignettes were shared with participants to explore or convey a definition of inclusion. These vignettes, more importantly, allowed me to view myself reflexively—how I viewed particular areas of the school, specific participants, my practice, my feelings, or interactions with participants.

The vignettes also served another purpose—they reminded me that qualitative ethnographic research is conducted by human researchers working with human participants. The use of terms such as ‘data’, ‘subject school’, the ‘field’, ‘transcripts’ and ‘analysis’ can obscure the fact that the research involves the feelings and perceptions of ‘participants’ known on a first name basis, and who are often neighbours as well as friends. Vignettes were not only used to capture a moment in the ‘field’ or as a tool of ‘analysis’, but to remind myself of my participant’s and my own vulnerability, as well as of my ethical responsibility to them.

### **3.6 Ethics**

In the following subsections the research is placed within the Code of Ethics mandated by the University of Canterbury Educational Research Human Ethics Committee (which granted ethical approval for this study—see Appendix 1) and the ethical responsibility of the researcher for reflexivity in practice.

#### ***Primary ethical considerations***

In designing this research project two key issues needed to be considered, that is, for whom was the research conducted and who will benefit by it (Kvale, 1996). These ethical principles guided my choice of methodology, as much as my focus on inclusion. They also reinforced the implementation of the Educational Research Human Ethics Committee (ERHEC) Code of Ethics in my research project (University of Canterbury, 2012). However, the ethical nature of my qualitative study was more than principlist as it was based on relationships (Cullen, 2005). The principlist paradigm, Cullen explains, assumes that research can be guided by a straightforward code of ethical conduct that focuses on the individual rights of the participant (p. 254). In contrast, a relationships paradigm, “is concerned with relationships and groups involved in the research and is context based” (p. 254). In my research I deliberately blurred the role of researcher and the researched, which caused several ethical issues and possible dilemmas to arise. I will consider each of the five principles listed by the ERHEC and briefly explore their impact on my research and conduct as a researcher.

#### ***Informed and voluntary consent***

In my research, I perceived potential participants as partners in an enterprise (Wolfendale in Sheehy, Nind, Rix, & Simmons, 2007), based on a relationship of mutual respect and trust. A key element of this relationship is informed consent (see Appendices 3a-3e). But in a whole school setting how could I ensure that any participants are not coerced into participating? My project was based around a whole school process, one that involved the entire school community. In such a situation it is not always easy to refuse participation. The decision to participate in my research originated with the school principal, who had the support of the school's Board of Trustees (BOT). I encouraged and worked with the Principal to get wide staff and student support, but there was, due to the nature of our hierarchical school systems, an imbalance of power (Biklen & Bogdan, 2007). I tried to minimise this potential issue in the criteria for school selection—the school I conduct my study in will have expressed a desire to participate in the *Index* process. However, unanimity of purpose in a diverse population is difficult to achieve. Only those willing to participate in my research did so.

### ***Respect for rights of privacy and confidentiality***

To examine the nature of the culture of a community means to travel deep within the beliefs and values of community members. In doing so it was vital that detailed and individually specific information be kept anonymous and confidential. This was especially true in a small community, such as the one where I live and conducted my research. Data were considered private and not shared with individuals who were not related to the research project, and data in its raw form were discussed solely with my supervisors. However, a project that involves a whole school might inevitably become common

knowledge. And life in a small community consists of speaking. My identity as doctoral candidate and researcher was well known, and the site of my research common knowledge. But having lived in several remote locations, I knew firsthand how news circulates. I have, as a result, learned the importance of discretion. While I could stress the confidential nature of what was said and request members to keep the confidentiality of discussions, I could not guarantee it.

As my project and methodology dictated an equal relationship with the members of the school community, honesty and integrity were essential. There is a high degree of importance placed on reciprocity (Harrison, *et al.*, 2001). I initiated my project in full consultation and collaboration with participants, and provided a clear lay summary of the proposed study. This summary included information regarding who I was and what I was doing (see appendix 2). It explained what I would do with the results of my study, provided an explanation of why the school site was selected, how confidentiality and anonymity would be assured, a description of the *Index for Inclusion* and the processes, and my proposed methods of data collection (Madison, 2005). On the surface of my study, this was all very straightforward. But my methodology was *critical* ethnography. I was facilitating change, and looking closely at the process of change. Not all the findings were positive, and the dilemma lay in how such findings were to be shared.

At this point it is necessary to return to the foundational ethical issues of the research. The findings were fed back into the school community in the most constructive manner possible. One example of how this was done was

providing the Principal with analytical memos regarding initial findings on inclusion. These memos were used to inform his own understanding and help him in explaining the concept to his staff team. Early observations regarding the provision of services in the school, presented in the form of a conceptual map, allowed the Principal and Heads of Departments that he shared it with, to see into areas of the school that were previously obscured or overlooked. As my relationship with the Principal developed and trust was established between us I was also able share concerns regarding specific staff practices, which in turn informed his ability to address them. Throughout this thesis no names of individuals or school areas have been used in order to preserve anonymity. The school is referred to as ‘the subject school’. Terms such as ‘special needs unit’ or ‘learning support area’ are used, as are references to individuals according to their role in the school, such as ‘the Principal’ or ‘Head of Department’. While an attempt is made in Chapter Four to balance detail to avoid easy identification of the ‘subject school’, in a community the size of Aotearoa New Zealand total anonymity can be difficult to guarantee.

### ***Minimisation of risk***

Working in a school involves working with young adults. When working with children at my participant school, my research was “with children rather than *on or for* children” (Horton in Sheehy, *et al.*, 2007 p. 94). The rights of the child were embedded in my research project. Cook (2008) cautions that, “Disseminating critical ethnographic work requires researchers to examine the power differentials between researchers and participants and to question who is speaking for whom and how they can be represented” (p. 150). Care was taken when communicating results, out of respect for the feelings of those

I worked with. As will be explored in Chapter Five, the process of change is often accompanied by discomfort or dissonance (Timperley, *et al.*, 2007).

### ***Obligations under the Treaty of Waitangi***

Finally, the research site had a very strong sense of Māori culture. The school has worked within the Te Kotahitanga (Berryman, *et al.*, 2010) framework for three years, and the Te Kotahitanga facilitator became a key participant and advocate for inclusion at the school. I was able to discuss with key staff about my primary research tool, the *Index for Inclusion*, and explore with them ways that Kaupapa Māori may be included in and influence the process of developing a more inclusive school culture. There was a similar relationship with the Head of the Māori Department. This may fall under the category of being “consistent with the Treaty of Waitangi obligations,” (University of Canterbury, 2012, p. 2) but the Treaty provides an ethical basis relevant to many relationships, and returns us to the foundational ethics of my research and my role as a researcher: the active protection and participation of peoples involved in the research in a meaningful and enriching partnership.

### ***Ethics in practice***

A sense of ethical probity also guided my conduct as a researcher in the school. I was given a privileged position in the school and allowed access to observations and stories. As my time in the school increased, the more trust developed between myself and staff members. Also, during this time my relationships changed. No longer was I just a research student, but in many situations I became friend, and even confidant. As such there was a

responsibility not to betray this trust. There were occasions when my role as activist was tested and constrained.

During this research I have come to understand reflexivity as something private, more than having anything to do with making data ‘valid’, ‘trustworthy’, or as Brewer (1994) put it, an ‘ethnographic critique of ethnography’. With time in the ‘field’ there is the freedom to think and reflect about what has been seen and done. Reflexivity is considered an ethical responsibility because reflection asks us to look at ourselves and consider what type of person, or what type of researcher we have been and aspire to be. The approach my research took was similar; not determined to find something specific, but rather maintain an open and flexible mind regarding possible outcomes.

### **3.7 Limitations of the research**

This is a study involving a single educational institution in Aotearoa New Zealand during a limited time period. Focusing on one school and the members of that community in an in-depth and sustained manner provided an intimate experience of change within that locale. While the experiences of that school can provide others with meaningful and valuable lessons about developing inclusive values and practices, it remains merely an example of one school in a specific location within the country. Remaining in the school for one full academic year I worked primarily with the teaching staff of the school. Although my interactions with the students of the school were rich, there was no formal participation of the student body in the *Index* process. Reasons for this were historic. At the time of the research year there was no

formal mechanism for student voice to be heard. Also, there was not a tradition of including student voice in the planning process. As discussed in Chapter 4, the administrative approach of the recent decade was one characterised as ‘top down’, which had ramifications for wider participation.

During the research year I was instrumental in helping to establish a student council to give students a way of expressing student voice, however, this primarily involved ensuring that the council was established for the following year. In this sense, the work conducted with students was pre-figurative, helping to ensure that student voice could be heard in both more formal and informal ways (see Appendix 5). Parental input into the process of change was also limited. Parents of students identified as ‘special needs’ were invited to participate, but none took up the offer. This could have been the result of limited opportunity to participate in the past. Parental participation and student voice were identified by the administration and staff as primary areas for future planning. Additionally, increasing community involvement in the life of the school was a priority in the year following the research.

### **3.8 Outline of findings chapters four, five and six**

Findings Chapters Four, Five and Six are based on yearlong participant observation of the subject school. The broader analysis and findings of each chapter are organised around the themes of ‘renegotiation of meaning’, the relationship of inclusion to culture, the need for time and persistence in developing inclusive cultures, and the pain (dissonance) that often accompanies the process of change.

Chapter Four provides a picture of the school community prior to embarking on the *Index* process. That chapter concludes with a description of how the *Index* process was experienced by school staff.

Chapter Five utilises the theoretical construct, or model, of culture described in Chapter Two to analyse the school experience regarding self-review and change. It explores the tension inherent in the change process on an individual and collective level as staff sought to renegotiate and implement core school values a levels of planning and types of change that was initiated by school staff

Chapter Six relates the experiences of the school staff to a deeper understanding of inclusion that developed in the school as a result of their experiences. The role school leadership plays in the process of inclusive development is also discussed. This analysis develops ideas about the possibilities for inclusion in Aotearoa New Zealand schools. The concluding chapter will present conclusions from the findings and discussions and consider the implications of the findings for developing inclusive culture in Aotearoa New Zealand schools.

# **Chapter 4: “A place for every learner”:**

## **The subject school and the Index for Inclusion process**

### **4.1 Introduction**

In this chapter the subject school is introduced. It describes the subject school at the beginning of the project to provide a context in which later findings can be discussed. Conceptual maps will be provided that begin to illustrate how core values have been put into practice. The framework known as the *Index for Inclusion* provided a way for the teaching staff to examine and reflect on their values and practices, to reflect on what their school ‘looks like’, how their values were expressed through artefact and practice, and to take steps to align values and practice. ‘Teaching staff’ is used in the context of this thesis to include administration, classroom teachers, teacher aides, Board of Trustees as well as others working in the school in other capacities, such as café staff and grounds personnel. This chapter also describe the *Index* process as it was experienced by the school and the initial changes inspired by that process. The *Index* process provided the impetus for change and its presence encouraged the reflection and exploration that created change in school practice.

## **4.2 Artefact and values: the ‘subject school’**

The subject school was created in the 1960s in response to the desire of the community to continue the tradition of co-educational schooling. Previously the city had one co-educational high school which was then divided into two single sex high schools. The popularity of co-education schooling in the community was reflected by the school roll which reached a peak of over 1200 students in the late 1970s. The character of the school reflected the projected image of the community and was known for academic and sporting excellence. The school was highly sought after by Pakeha families and taught a variety of European languages. Today the school population is over 650 students, and the school is categorized as Decile 2. A ‘Decile’ reflects the socioeconomic nature of the school intake; a low Decile means that a high proportion of students are from low socioeconomic homes (Ministry of Education, 2014; Wylie, 2012). The school roll reflects the demographics of the area and has a high percentage of Māori students. The staff also includes a large percentage of Māori, making up 40% of the staff team and including the Principal, a Deputy Principal and several Heads of Department. The school is now renowned for cultural activities.

Such a shift in character, from a predominantly ‘white’ to a predominately ‘brown’ school, reflected changes in New Zealand society during this period. The ‘Māori renaissance’ beginning in the late 1970s led to a resurgence in Māori culture and the increasing perception of New Zealand as a bicultural nation (Amoamo & Walker, 1987). As a result, the school took on the character of a bi-cultural school. The neoliberal reforms ushered in by the Lange government represented not only economic policies that negatively

impacted the region's rural economy but also ideological values differing from the previous generation (Kelsey, 1997). Co-educational public education was not valued as greatly by a newer generation of parents encouraged to see education as a personal and private investment in their child (Gordon, 1994; Gordon & Morton, 2008; Wills, 2006). For the school this contributed to a process referred to as 'white flight' (T. Jackson, 2010; Rossell, 1976). The 1990s saw the region trying to recover from the economic shocks of the previous decade. Unemployment, gang violence, and urban decay led to innovative renewal efforts, such as the palm-lined streets that now greet visitors (*fieldnotes: interviews*). Many features of the school date from this period. Murals were painted, sculptures erected, new and innovative departments formed, such as the music block and the counselling department.

Such changes, however, obscure the consistencies within the school during its first fifty years. Creating a school allowed core values to be embedded in the school's culture. Despite changes in demography these values have been reiterated and re-interpreted by new generations of teachers. The school is "a caring school" (*fieldnotes: interviews*). It is a place where staff are encouraged to "do the very best you can for the kids you have" (*fieldnotes: interviews*). The "school has a class for everybody" (*fieldnotes: interviews*). Collegiality is celebrated among staff (*fieldnotes: interviews*). The students reflect an openness and acceptance. "[Our] kids are like that," a teacher noted, "they aren't like that at every school" (*fieldnotes: participant observations*). There have been several setbacks to the school. Some of these relate to the appointment of specific principals whose style of management may have conflicted with the ethos of the school. 'Top down' management

approaches resulted in staff disaffection and conflicts within senior management. During each of these periods a strong cohort of long serving staff have ensured the survival of “the [school] way.” At the time of this research over ten members of staff had served for over twenty years at the school. Some began their careers at the school immediately after university, others have returned to the school having been former students. Similarly, there are several teaching couples, as well as whanau/family connections.

The recent decade was a period described as ‘difficult’ (*fieldnotes: interviews*). At the end of the decade morale was low and the Year 9 intake was the smallest in many years. The acting Principal (a former Deputy Principal at the school and soon appointed as Principal) set as his goal the turning around of the present malaise. “I saw everybody was really depressed,” he reflected (*fieldnotes: interviews*). The school year typically begins with two full ‘teacher only’ days devoted to professional learning and located away from the school. His first year’s ‘teacher only’ days took place at the stark and exposed coastal area where his own marae is located. Team bonding activities were remembered as physically demanding. To the Principal this represented what the school had been through and the effort they had to expend to repair past damage. It represented a year of hard work facing the school.

The following year’s ‘teacher only’ days (the year of this study) contrasted sharply to the previous setting. This year teachers found themselves sheltered by trees, at a park many remember fondly as where the council managed a (now disused) open air swimming pool. Team bonding activities involved challenges designed to bring out laughter. Staff had time

to catch up on family news and re-form friendships. “I wouldn’t have known that a colleague’s dad had died during the holidays if we hadn’t had today,” one of three Deputy Principals (and my neighbour) told me as we drove home (*fieldnotes: interviews*). The environment was sheltered and reflexive—the hard time had been weathered and now was the time to look forward with more strength and experience. The Principal was looking for a way to build that change, sustainably and collaboratively. He hoped that the *Index for Inclusion* would offer this, a way to help bring the school from ‘good’ to ‘outstanding’ (*fieldnotes: participant observations*).

### ***Expressions of ‘inclusion’***

Following the introduction of *Tomorrow’s Schools* (New Zealand Education Act, 1989) it was the right of every child to enrol in their neighbourhood school. In response, many schools began to experiment with providing for students with diverse needs. In the subject school this provision was in the form of a proposed special needs ‘unit’. Special needs units are usually specifically designed locations within a mainstream school providing services to students with high and complex special educational needs (Ministry of Education, 2013a). Such areas are typically staffed by specially trained teachers who provide individualised or group instruction (Mitchell, 2010). While a small percentage of special needs units are managed by special schools located nearby and are considered ‘satellite units’ of that school, the majority of units in New Zealand, such as at the subject school, are staffed and managed by the ‘mainstream’ school itself.

For many, inclusion or at this time ‘integration’, was a new concept. Many staff at the time were concerned that ‘allowing’ students to attend who were then referred to as ‘intellectually handicapped’ would reflect badly on the image of the school, which prided itself on an academic focus (*fieldnotes: interviews*). Staff were also concerned that the presence of students with diverse needs would bring disrepute, as such students might display ‘inappropriate’ behaviours. After a fight described as ‘hard’ the unit was established and although acceptance was described as slow in the initial years, the unit and the students came to be an accepted part of the school (*fieldnotes: interviews*). The attendance at the school of students deemed to have ‘special needs’ offered the school an opportunity to explore the nature of inclusion and how school values were reflected in practice. Prior to the use of the *Index for Inclusion* in the school, ‘inclusion’ with students considered ‘special needs’ was done without directed individual programmes for learning, did not fully consider the implications of access to key areas of the school, and was implemented in a very ad hoc and individual manner.

Two years prior to their use of the *Index for Inclusion*, and prior to the appointment of the current Principal, a young student with learning difficulties was expelled from the school for bringing an air rifle into a classroom and injuring another student. Why he did this is unclear but it is suspected that he was being teased in some way (*fieldnotes: interviews*). Having no organised schedule as such he was well known throughout the school, as his wanderings brought him into contact with many students and staff. His name came up on several occasions by students when they were recalling students from the unit that they knew (*fieldnotes: participant*

*observations*). He was remembered as being very energetic and excitable. The lack of programming or the creation of a schedule that would provide a stimulating learning programme led to another student being removed by his caregivers early in the research year. This student's caregivers voiced their displeasure at the absence of an effective individual educational programme. Both of those students now attend another school located nearby.

About seven years ago a senior student removed himself from the school when he felt his needs were not being accommodated appropriately. This student, who was born with a physical disability, was dependent on an electric wheel chair for mobility. Learning supports for the student were reported to be minimal, even to the extent that he was unable to access his class notes and his laptop without assistance. He was expected to ask his classmates to meet his needs; including opening doors for him whenever he wanted to enter a room. A teacher aide (female) was provided for two hours daily support solely to meet physical needs, such as washing and toileting. In his last year at school he was elected a prefect by his peers, however, after the first prefect meeting was scheduled in a first floor room accessible only by stairs, the young man, then in Year 13, checked himself out of school (*fieldnotes: interviews*).

These experiences make up a small but significant contribution to the collective memory. Other, more positive, examples also contributed to the shared experience. A previous Head of Department (HOD) of physical education would deliberately 'adopt' a student from the special needs unit and invite that student to become a member in his form class for the duration of the year. The relationships developed between him and his students with the

student from the unit meant that the arrangement usually carried on through subsequent years. The HOD's proactive arrangements were done as an individual initiative, but his actions were highly visible to other staff. When this HOD left the school to take up a post in a neighbouring city the teacher replacing him as HOD continued the practice. He developed a relationship with a student from the unit, and also gave that student a meaningful role in assisting with some physical education classes.

The relationship between the two, the teacher and the student, went beyond mentoring and became that of valued friends. During the research year this relationship was evident in many ways. As the student was not provided with a structured programme, the HOD welcomed him into his PE classes. "It's not a joke really," the HOD related after working with the student for several years,

I always call him my second in charge. If I am away he is the 'go to'. He is the only kid, he's the only person, I actually trust with my keys. He's the only person I give my keys to (*fieldnotes: interviews*).

Initially the student could not communicate, as he had a severe stutter, but as time went on and he continued to work with the HOD he became a "chatter box". The research year at the subject school was this student's last year attending school (as he turned 21 years of age). While unable to offer paid employment, the HOD has extended an invitation for the student to come at any time and help with the department in the future. He had nothing but praise for his young friend.

He can do anything that he feels like doing. He locks up the change, he gets the gear out, he can monitor situations—he is starting to read

situations ahead of time, he'll say, 'ah, they're going to cheat over there.' He can remember things I can't. He remembers kid's names faster than I can learn them. He knows who is on duty on the court [covered sports area] every day of the week and I can't do that (*fieldnotes: interviews*).

The example of this relationship provided a powerful illustration to the students and staff of what inclusion could look like and reflects the high value that this teacher places on a student with 'special needs' as a member of the school community. At the senior prize giving at the end of the year this student was honoured with a 'Principal's Award' and the entire senior class stood to applaud, the first time this was done for a classmate in several years (*fieldnotes: participant observation*). Conversely, the experience with this student also highlighted what the school, after reflecting through the *Index* process, wanted to change, notably leaving a student without a programme and not preparing him for life beyond school as well as they could have, what many would come to appreciate as necessary for all students.

### **4.3 Maps of the school**

When I asked teachers to describe their school in five words or less, the most common answer used only two: "caring" and "sharing." These ideas feature heavily in a conceptual 'map' of the school and offer an insight into the culture of the school. Field notes and interview transcripts of my initial six weeks at the subject school illustrate how "caring and sharing" were manifested and interpreted in daily practice. This initial view is essential to understand future work with the *Index for Inclusion*. In the discussion below I will describe two maps that illustrate how student needs and abilities, provisions for meeting perceived student needs, and staff and student

perceptions of students and their varied needs, were reflected in the quality of participation in the life of the school.

### ***Place and need***

What emerges from the maps is a picture of a school where there is a place for any student, no matter what their level of need. The further away from the centre that support is located, however, has implications for a student's participation in the life of the school. One effect of the arrangement of service provision involved the unanticipated segregation of some students. At the centre lie the majority of the school population, 'the mainstream'. Within 'the mainstream' are a group of students known as 'extension'. These extension students are offered courses at higher levels. Remediation efforts are extended to assist any 'mainstream' student with difficulties in reading, writing or maths. If the needs of students were deemed too great to be accommodated by 'mainstream' teachers, then those students would be referred to the learning support area. This area supports students up to Year 12. Within the learning support area, if needs are such that a student would struggle in either of the Year 9, 10, or 11 classes, then they will be assigned to Composite class. Half of the students in Composite class receive ORS funding.

However, if a student's need is considered so great that the teacher of the Composite class cannot offer support (or their physical needs present them from climbing the stairs to the learning support area) then the student will be referred or placed within the special needs unit. Parents and whanau are consulted throughout this process and their views and desires are respected. The motivation of the teaching staff is also guided by trying to offer what is

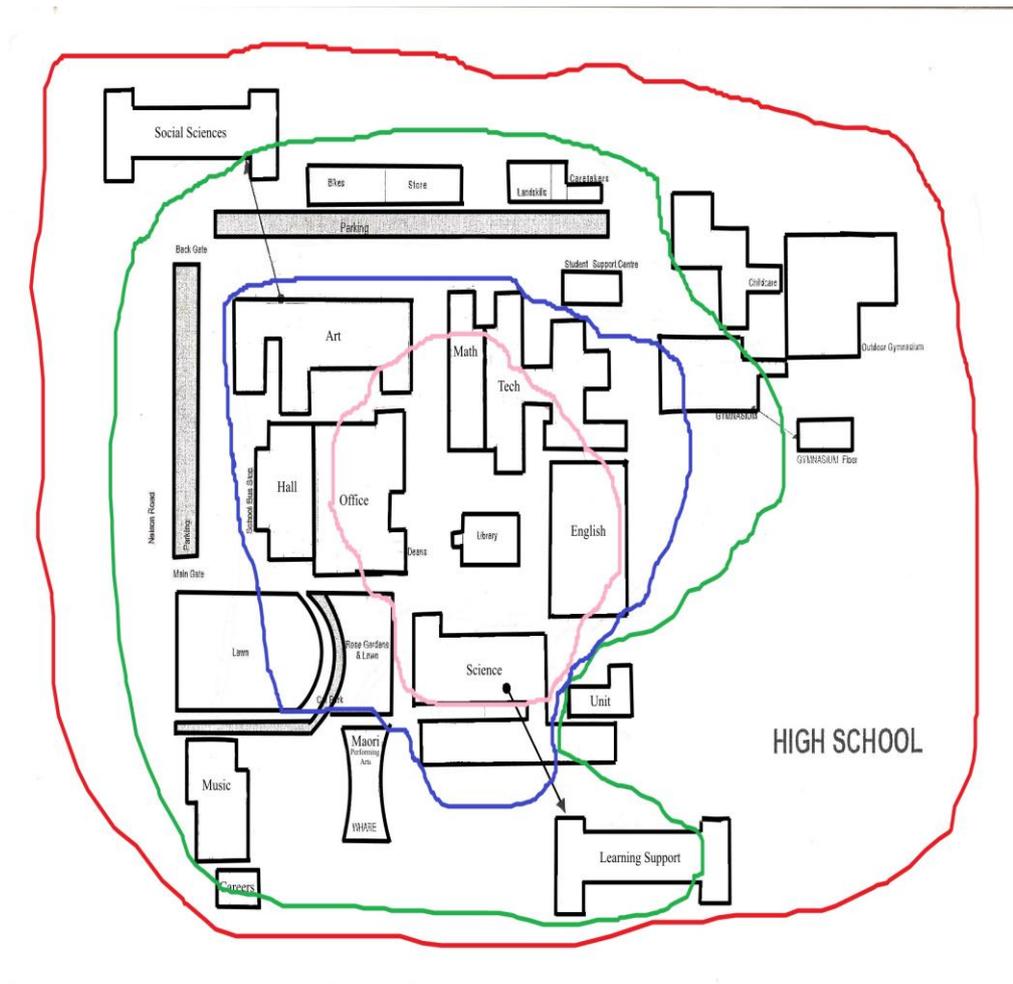
deemed best for the individual student. Where a student is placed had a concrete bearing on the quality of participation they would experience at school, as well as the quality of education they received. The student in 'the mainstream' had full access to what the school had to offer. However, as Macartney (2009, 2011) notes, students considered as 'special needs' had that access curtailed in relation to that perceived 'need'. Carroll-Lind and Rees (2009) speak of the priorities of a 'system' over-riding individual need or desire. Despite being in a 'regular', or 'mainstream' school, the students placed in a special setting did not experience inclusion (MacArthur, 2009). The setting, and the lack of a coherent system, created a barrier to learning and participation. Students located farthest from 'the mainstream', students deemed most in need of support, were the students who participated the least of school life.

### *Conceptual maps*

The first map should be considered as a bird's eye view of the school layout: where its buildings and classes are situated. This will then be contrasted and compared with a mind map of school departments and service provisions. In many important ways these maps overlay each other. Physically, school buildings are roughly laid out in concentric circles. In the middle is the school library. While not being 'central' to the running of the school it is the one place in the school that all students and staff share and have equal access to. In an important way it is an 'inclusive hub', though it was not initially recognised as such. Surrounding that location is the school office, math classes, and English classes. Further out are found the art block, technology, and science. Further yet can be found the music block, Māori performing arts

and the wharenuī, the gymnasium and the special needs unit. Closer to the centre, yet on the first floor above math and science, is found the learning support area.

As school buildings have not been laid out in precise circles, it is useful to visualize circles of string laid upon the map. These strings represent centrality to what is referred to as ‘the mainstream’. First, there is a tight circle around the library, then a looser circle around the office/math and English, next a larger circle which includes options, and finally a large circle of string around the entire school. To make the view a more accurate depiction of the school at this time, it is necessary to push the circles in specific locations. One such place was the special needs unit. Here the string immediately inside the whole school circle would be pushed, forming a dent, until the unit stands well outside all the inner circles. Were it possible to depict three-dimensionally there would be a dent in the third string out from the library depicting the learning support area on its first floor. Some circles would be stretched to include them, as the music block, for example, sits farther away from other central building (and music is an option accessed by almost all students).



**Figure 1: Bird's eye view of subject school**

The second map features school departments and their place in the school, not physically, but conceptually. Circles are used to visualise this map, but these circles are utilised as a mind map. At the centre of this representation is a large circle labelled 'the mainstream'. 'The mainstream' was a term used widely in the school to describe all classes, core subject or options, in which additional learning support is not employed. The term was so familiar among staff and students that my use of quotation marks around it, in written form or in gesticulation (two fingers to simulate speech marks) required explanation on a several occasions. While interviewing the HOD of

the learning support area my explanation was in the form of a provocative question: “Is ‘mainstream’ synonymous with ‘normal’?” (*fieldnotes: interviews*). She began to engage in an exploration of meaning, a reflection encouraged through the *Index* framework and a recurrent theme in this research.

Lines leaving the central ‘mainstream’ circle attach departments established to support students with additional needs. When the term ‘mainstream’ is used, these departments are not being referred to. Closely linked to the ‘mainstream’ are provisions for remediation. The school employs one part-time maths teacher who is part of the Mathematics department to assess and teach any ‘mainstream’ Year 9 or 10 students experiencing difficulty in that subject. The Literacy department stands outside the English department yet fulfils a similar function. Year 9 and 10 students from the ‘mainstream’ experiencing difficulty in reading and writing receive extra tuition or are placed in a literacy class taught by the one fulltime teacher. Another staff member is employed the equivalent of 0.2 of a position to assist with small group work.

Also outside ‘the mainstream’ is the learning support area. The learning support area is a department consisting of four classes (Composite, Year 9, 10 and 11) that supports students with additional learning needs and who have been deemed to have extensive difficulty in the core subjects of English/Literacy and Mathematics (*fieldnotes: interviews*). Students attending the learning support area have been assessed to have learning needs that would make it difficult for them to succeed in ‘mainstream’ core subjects. No boundaries are drawn around most of the learning support area as students

in classes (Composite excluded) have option classes in ‘the mainstream’ and Year 10 and 11 students do not necessarily take them with their learning support area classmates—they can choose what options they wish to attend. Composite class travel as a cohort to each option class attended (they attend three different option classes) as do the Year 9 students (who attend two option classes), however, when the interval or break bell sounds they are free to access their school unsupervised or monitored by a teacher’s aide.

### ***The special needs unit***

Within the subject school the special needs unit caters for students considered ‘high needs’. During the period of this research there were eight fulltime students attending the unit, seven of whom were male. This unit has traditionally been isolated and marginalised from ‘the mainstream’ of school life (*fieldnotes: interviews*). Staff from the special needs unit, consisting of one fulltime female teacher and four female teacher’s aides (TA), were not expected to participate in daily staff briefings, nor were the students expected to participate in whole school activities, such as sports days or assemblies. The practice that developed was that the students from the unit would begin each day in that classroom, a standalone building by the school field. Certain activities, such as swimming, a weekly visit to the town library, or horse riding (Riding for the Disabled) would see the students leave the school grounds as a cohort. Twice weekly the students would go for a walk with their teacher aides, once again leaving the school grounds. Students had ‘options’ classes with five other teachers and they would attend these classes as a cohort. Subjects included one period of physical education, art and music, and two periods with two other teachers for a variety of activities. When not with

their 'options' teachers the students remained with the unit teacher or teacher aides in the special needs unit.

While priding themselves on creating a place for every learner (*fieldnotes: interviews*) the school inadvertently created a place that was isolated and segregated from 'the mainstream' of the school. Students of the 'unit' had no opportunities, as outlined in their schedule above, for meaningful participation with their peers. Similarly, the unit teacher and unit staff had no opportunities to interact collaboratively with the staff of 'the mainstream' school or the learning support area. As the unit was set aside as a 'mini' department of its own the unit teacher had no systemised way to discuss her work with a colleague. She acted as her own 'Head of Department' and as such there was no senior administrative oversight of the educational programmes instituted in that area. These structural barriers led to the exclusion of students and staff from the ordinary activities of the school (MacArthur, Kelly, & Higgins, 2005). The unit teacher also acted in the role as Special Education Needs Coordinator (SENCO) and received a stipend for this responsibility. This was a position awarded to her by the previous principal, however, the school did not possess a job description for that role nor clear understanding of the responsibilities involved in such a coordinator capacity.

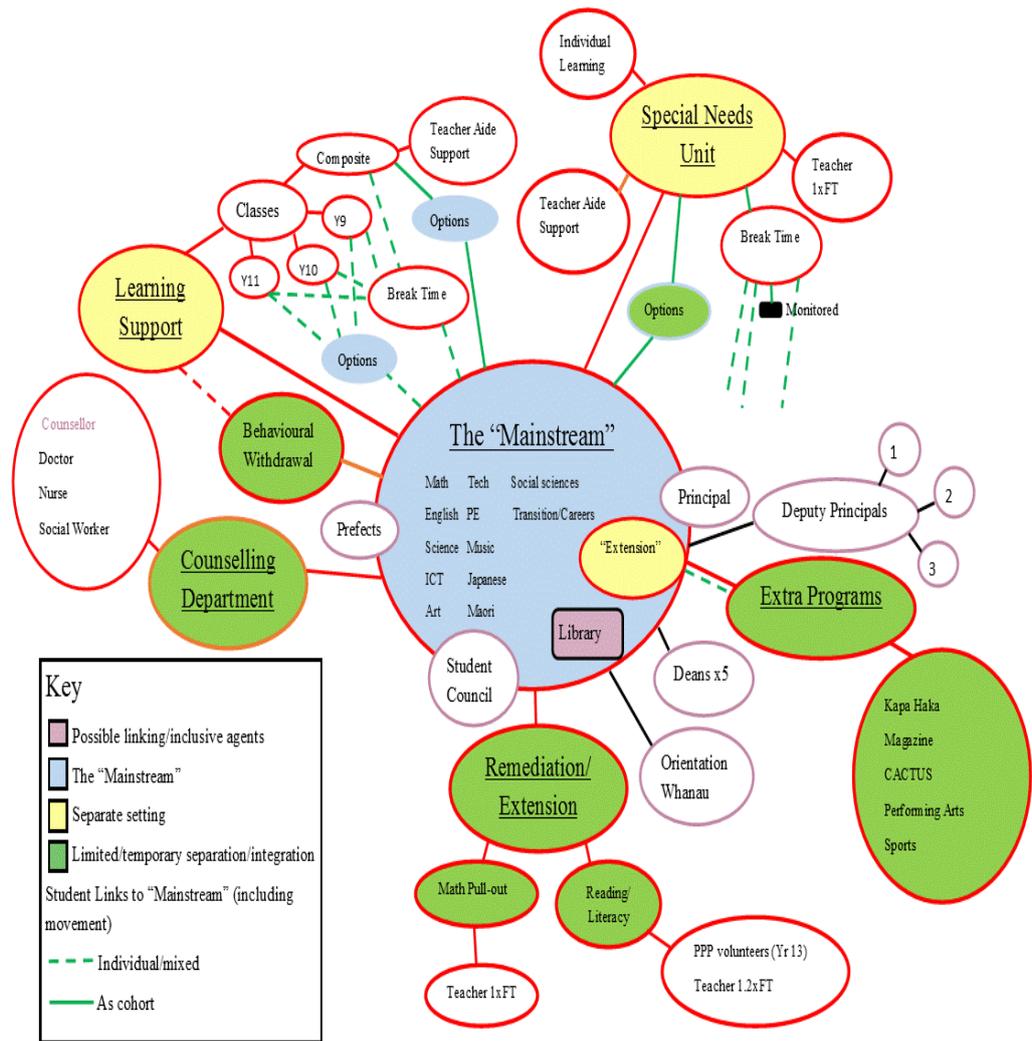


Figure 2: A mind map of subject school

#### 4.4 The Index process

The utilisation of the *Index for Inclusion* in the school permitted the staff an opportunity to reassess how school values such as ‘caring and sharing’ were exhibited through practice. Over the course of the year this practice was examined as part of the self-review process. The presence of a framework facilitated the exploration of deeper values and assumptions, and encouraged staff to collectively and individually explore the tension between values and

beliefs and their reflection in artefact and practice. How the staff's understanding of inclusion was enacted and negotiated will be the subjects of Chapters Five and Six. As the *Index for Inclusion* played a key role in the change process at the subject school, the implementation of the *Index* will be examined in this section.

### ***Getting started***

The *Index* process involves five phases in its planning cycle: getting started, finding out together, producing a plan, taking actions, and reviewing those actions. 'Getting Started' first required explaining the *Index* process to the school leader, pointing out the collaborative nature of the approach, features that build on existing strengths and contribute to sustainability. As 'inclusion' was a word the Principal had heard previously but never fully sought to define these meetings also involved discussion about the nature of the term. We explored diagrams, such as a large circle in the centre of the paper that represented the 'norm' or the 'mainstream'. A smaller circle outside of the larger one represented students with 'special needs', who can frequently find themselves on the 'outside' or excluded. Additional small circles were added to this drawing, and together we listed other students that might find themselves excluded. Inclusion could involve pulling those little circles into the larger one, we mused, or it could involve pushing out the boundaries of the big circle until it held everyone in the school community. These discussions involved a process of demystifying the word 'inclusion'. At this stage copies of the *Index for Inclusion* were distributed to initiate and sustain a learning journey around the concept of inclusion and how the school could adapt and use the *Index* framework.

The Principal agreed to assume the role of *Index* driver within the school. After the initial six weeks of the school year we used a full staff meeting to explain more fully what my role was in the school, my background and rationale for the study, and the *Index for Inclusion*. We invited any staff interested to join a planning group. The planning group in the *Index* process acts as an organising body, tasked with steering the process through the school community. Membership of the group should ideally have a wide representation (“teaching and non-teaching staff, parents, children and young people and [Board of Trustees]”) (Booth & Ainscow, 2011, p. 54). However, at the subject school membership was initially directed towards staff and the Board of Trustees. While student voice was a priority for the Principal, no students were recruited for the planning group. Running parallel to the *Index* process was the development of a student council and through this vehicle, such as through the use of the student questionnaire (see Appendices 4 and 5), the *Index* exerted influence.

The two weeks following this staff meeting were spent developing relationships and providing copies of the *Index for Inclusion* to staff expressing interest. The first planning group meeting took place in the library during a lunch hour in week eight of the first term (*fieldnotes: participant observations*). I acted as facilitator during this meeting which took the shape of an informal chat about what attracted each member to the *Index* process, what each hoped to see from its use at the school, and some ideas regarding next steps. Each of the five staff members present (three others could not attend) had a personal connection to experiences of exclusion or a professional stake in working with students that may face marginalisation.

For one member, for example, it was a concern for ESOL students as well as the personal experience of her grandson who was born with cerebral palsy (*fieldnotes: participant observations*). Another was a parent whose child went through the learning support part of the school and had an insight into “who is in and who is out” and a desire to help create a school where all students can say that it is “my place.” Yet another team member had grandchildren attending the school and took a special interest in the unit, saying that, “if we can get it right there, we can get it right everywhere in the school” (*fieldnotes: participant observations*).

The next planning group meeting did not take place until the following month after team members had time to familiarise themselves with the *Index*. Meetings between myself, acting as ‘critical friend’ with *Index* implementation, and the Principal in his role as *Index* driver, afforded opportunities to explore ways to introduce the self-review aspect of the *Index* process. The questionnaires located in the *Index for Inclusion* provided a ready-made resource for self-review, and they also provided a focus for the second planning group meeting. A staff meeting scheduled in week 2 of the next term was identified for introducing the questionnaires to the whole staff team.

### ***Finding out together***

The second *Index* planning meeting was well attended, with nine staff members (another teacher joined the planning group at this time) representing diverse areas of the school (*fieldnotes: participant observations*). The Principal acted as chair for the meeting. Having looked through the

questionnaire previously several alterations to the template offered in the *Index* were suggested (see Appendices 6 and 7). As the text of the questionnaires can be changed to reflect the local culture, terms such as ‘governors’ used in the United Kingdom was replaced by ‘BOT’, and the word ‘child’ or ‘children’ replaced by ‘student’. The questionnaire is a self-reflective tool that starts the process of thinking about inclusion in the school and encourages dialogue. The planning group discussed and explored the relationship between indicators in the questionnaire and questions provided in the *Index* that elaborate each indicator. The planning group decided to have the whole staff team complete the questionnaire during the next full staff meeting. Teachers would complete the questionnaire individually or in pairs. During that full staff meeting the Principal introduced the nature of the activity, spoke about the *Index* and showed the staff extra copies of the *Index for Inclusion* provided and how these could be used to elaborate on indicators. After twenty minutes the majority of the questionnaires were completed (*fieldnotes: participant observations*).

I collated the results from the 38 completed questionnaires and provided a themed summary to the planning group prior to their next meeting. Staff not completing the questionnaire were those either absent due to other commitments or working part-time and required to only attend alternate staff meetings. While the results pointed to areas for attention, they likewise indicated areas of strength, and the planning group looked at these first. Comments on what was liked about the school showed that more than half the staff listed “the students” and “colleagues”. There appeared to be a difference between results that were largely *systemic*, such as the coordination

of support (this item received only 2 ‘agrees’ compared with 16 ‘disagrees’); results that were *attitudinal*, such as consistency between staff in the interpretation and implementation of policy, and results that were more specific, or *action based*, in that they could be approached effectively and quickly. The interpretation of ‘agree and disagree’ was discussed. Question B1.9, for example, was pointed out by the Principal as 28 respondents selected ‘agree and disagree’. That indicator on the questionnaire stated, “Students are well prepared for moving on to other settings” (Booth & Ainscow, 2011, p. 176). The Principal was alarmed that such a high percentage of staff may have been doubtful of what he felt was the primary purpose of education (*fieldnotes: interviews*).

### ***Producing a plan and taking action***

During the next staff meeting the questionnaires were used as a tool to initiate and stimulate dialogue around school practice and culture, as well as provide a justification for taking action where it was deemed necessary. I was deliberately absent during this session. The reasons for this were to ensure that the efforts of the staff were associated with the school and not me, and to thereby increase the sustainability of staff efforts through collective ownership of the process. Data regarding this staff meeting were acquired through interviewing staff following their activities. The Principal let it be known at the beginning of the meeting that he had certain groups of students in mind, namely students from the unit and from the Composite class in the learning support area. When it came time during the meeting to focus on action he circulated around the room keeping groups focussed on what the individual teacher could do, working with individual students. Mostly such

guidance wasn't required. He recalled two groups of teachers interacting that also illustrates the negotiation process encouraged through the *Index* process:

One group was talking about knowing all these kids and greeting them, saying 'hello', and another group said, "that's rubbish, that's not inclusion, that's a cop out—what, so you say 'hello' to them and somehow they have a greater feeling of belonging?" (*fieldnotes: interviews*).

During this meeting the Principal stressed the need to start learning by doing, not waiting for a vision of tomorrow to someday arrive. "It is actually the acts that you can do right now, the deliberate acts that I can do right here and now" (*fieldnotes: interviews*).

The teachers also explored ideas to either bring marginalised students into the 'mainstream' of school life, or to bring the 'mainstream' to them. The Principal asked:

In what ways could we bring them or could we visit them, one or the other or both ... how could we take our learning from our classroom to their classroom and how could we bring them in to be part of our learning as well (*fieldnotes: interviews*).

The unit, one teacher later expressed, was "like a pimple you don't touch," and the staff meeting helped break that down (*fieldnotes: interviews*). I explored with this teacher the idea of separating the unit students during certain class periods rather than think of them as a single group. "I bet teachers would freak out initially, but once they are there for a while they would learn how to integrate them in," he mused. Another teacher interviewed was more direct in her approach. Her view was that inclusion was "not about charity at the bottom, it's about inclusion throughout" (*fieldnotes: interviews*). Her

approach is one of brokering partnerships. “Including unit students into the ‘mainstream’? Just do it.” She emphasised: “We understand fully the steps: relationship first, model the learning, let them attach to it, and if they go further it’s because they want to.” Her department was ready, she said, the classes were already heterogeneous, there is inter-community conversation, there is no stigmatisation. “Including marginalised students? All it needs is a plan” (*fieldnotes: interviews*).

This meeting gave the staff an opportunity to explore a collective definition of inclusion as a concept that involved all students of the school. ‘All’ to the staff meant a wide diversity of learners and had implications for the role of students in planning, assessing and teaching. The definition of ‘teacher’ and ‘student’ and the boundaries placed around them were discussed. Staff also noted difficulties that impede inclusion, such as special needs as well as the danger of students not being noticed. They emphasised the need to ensure student voice, of ‘ownership’ of students, and of belonging. A strong feeling emerging from the dialogue was that, “it’s about how we think, not necessarily about what we have done.” Notes from the meeting were given to the school secretary to collate and distribute to the staff. These notes included flow charts representing brainstorming activities to feed into initial planning (see Appendix 9).

#### **4.5 Levels of planning and action**

Each phase of the *Index* process required time to get started, to self-review and to reflect and plan. *Planning* in the school took place in different forms. During the staff meeting where staff were encouraged to think ‘locally’ about

what they could do in their immediate spheres of influence, ideas emerged to increase the participation of marginalised students. Part of this process involved negotiating between teachers, such as the technology department. It also involved discussing with individual students, including students from the unit, what their preferences were. This kind of planning was *informal* in nature.

Planning on another level involved school *systemic* change. This planning took place on several levels and frequently involved the Principal negotiating between individual staff members. Following questionnaire findings, the Principal began to investigate how to incorporate school supports under one umbrella, organising service provisions in a way that maximised the use of resources for the benefit of the whole school. When he confessed that the role of Special Educational Needs Coordinator (SENCO) had no job description I provided him with several. He held meetings between the current SENCO (the unit teacher) and the HOD of the learning support area to initiate a discussion about change. These discussions allowed both teachers to become more receptive to the need for change.

The HOD of the learning support area even stopped while passing my office at one point in the year to ask, “What do *you* think?” regarding her ideas for altering the entire model of service provision in her department (*fieldnotes: participant observations*). She shared an experience of having students from year 10 in ‘the mainstream’ coming to her class for remedial support (*fieldnotes: interviews*). This experience allowed her to see her department as a resource for any student in the school experiencing a difficulty in any learning area. She said that she had been looking at other

models of support in schools in the area and sought to restructure her own department. She recognised that the amount of resources allocated to her department could be used to benefit not just that department, but invite students needing extra support into the ‘learning support’ area. Systemic planning took much more time, thought and consideration to be formulated, as it involved changes not only to existing practice, but also relationships between colleagues.

Planning of more immediate aspects of practice was not written formally on a school development plan. It was informal in nature and evolved out of previous discussions and explorations of values. A planning framework is provided in the *Index for Inclusion* (Booth & Ainscow, 2011, p. 175) which is divided into the three primary areas of the *Index*: creating inclusive cultures; producing inclusive policies; and evolving inclusive practices. However, these forms were not utilised by the school planning team for varied reasons. Staff saw the reflection process as ongoing, as is evidenced through the exploration of values and practice discussed in the following chapters. Meetings, such as *Index* planning group or larger staff meetings, were times to collectively explore ideas and lessons being learned. This type of informal exploration was the ‘school way’ of delving carefully into the inter-related areas of culture, practice and policy during the research year. This informal manner of planning will be addressed in the final chapter of this thesis as part of a discussion on reflections and recommendations for *Index* use.

Space for this informal planning was set aside through allocating staff meeting time where staff explored, in small groups, what inclusion meant to them and laid the ground work for action planning. In exploring ‘points of

difference’ (what set their school apart from others in the community) in preparation to the school open day the staff developed this further in creating a shared description of the school they wanted—“a school with heart and choice,” where there was a place for all learners and diverse cultures (*fieldnotes: participant observations*). Staff once again worked in small groups and brainstormed these ‘points of difference’ on a blank sheet of paper. They then moved about the room to look at what other groups had written. Each sheet was then collected by the two newest members of staff who themed the written comments, an exercise that also served as an induction for those two staff members into the culture of the school (Gomez, 2000). The major themes highlighted were a range of educational and cultural offerings and the good relationships between staff and students based on a mutual respect. These themes reflected the growing expectation that participation will be about *all* and that learning needs to reflect the individual student’s goals and desires.

An additional example of informal planning initiating newer practices was seen in the support surrounding students from Tonga. In this situation staff identified a group of students facing possible exclusion as a result of cultural and language difficulties. The teachers working with these students met and collaboratively planned how to ensure these students could best be supported to maximise their participation at the school. These teachers linked with the whanau class teacher (a class designed to transition students from neighbouring Māori immersion schools to access English language based subjects) and created a literacy/language programme to meet the Tongan students’ language needs. The teacher based at the Information Technology

(IT) department made her classroom and self-available to the students, which led to the female Tongan students forming a dance group in the school. Senior management responded to the efforts of these teachers and helped formalise the arrangement by offering an additional paid hour to a part time staff member to act as liaison between the school, the Tongan students and their families. Thus informal planning evolved into a more formal model of support. The staff collaboration also acted as an example of what could be achieved in building support networks around other groups of students.

#### **4.6 Chapter summary and discussion**

This chapter has offered an overview of the subject school and how it was found by the researcher prior to work with the *Index for Inclusion*. In trying to accommodate all students in reflection of core values, the school inadvertently segregated some students from ‘the mainstream’ of school life. In doing so the school reflected a tension between a deficit or medical model of disability and that of a social model of disability, manifested in a clear distinction between ‘regular’ and ‘special’ education models (O'Brien & Ryba, 2005). Students deemed to have ‘special needs’ were provided separate learning environments within the school setting, and while the presence of these environments offered the potential for meaningful inclusion, that potential was not being realised.

Slee (2011) notes the effect this form of segregation can have on student identity. Self-image and self-confidence was an issue for several students within the learning support area (*fieldnotes: participant observations*). Their placement within the school was reflected in how they

viewed themselves as learners and roles they saw for themselves in the larger school setting. This was also true of students from ‘the mainstream’. Exclusion and inclusion are pedagogical, forming a ‘hidden curriculum’ (Rietveld, 2009, 2010) that teaches both the student with ‘special needs’ and the student from ‘the mainstream’ important lessons about themselves and others (MacArthur, 2009; MacArthur, *et al.*, 2005; MacArthur & Morton, 1999; Paliokosta & Blandford, 2010; Slee, 2001b).

Prior to the research year the school had some experience with inclusion, however, this was often in an ad hoc or individual manner. As discussed in Chapter One, without reference to a framework that enabled teachers (and students) to reflect on beliefs or practices the culture could remain static (S. Freire, 2009; S. Freire & César, 2003; Paliokosta & Blandford, 2010). Through the review and reflection aspects of the *Index*, staff were increasingly able to reflect on the definition of core school and individual values and become increasingly aware of disjoints between believed values and actual practice within the school itself. As a result, staff began to plan both informally and formally to enact school change. Change was encouraged in attitude, in practice and in school systems.

The following chapters explore the process of change that took place throughout the research year. The modern school is a multi-layered and complex institution. Chapter Five closely considers the re-negotiation of meanings and the restructuring of school services to more accurately reflect what was individually and collectively felt to be cultural expressions of school values. Chapter Six identifies core elements of inclusion evidenced through the experiences of the staff team and the school leader. This deeper

understanding of inclusion, and the experience of school staff in the development of an inclusive culture, provides a useful example and insight to schools in similar situations.

# Chapter 5: “Where is [\_\_\_\_\_]?”: Re-examining values and how they are applied in practice

## 5.1 Introduction

This chapter presents findings regarding the change process within a school developing an inclusive culture. Chapter Two presented a model of culture which situated the change process within the school (Hall, 1966, 1983, 1989, 1990). This chapter considers how the re-evaluation of values within the individual can impact the school culture. It will also examine how negotiation and re-negotiation between individuals resulted in meaningful change on a systemic level. The development of inclusion within a school culture is a process of continued reflection, re-negotiation, and experience carried out over a sustained period of time (McMaster, 2015). This process involves persistence, and can be the site of dissonance both within and between individuals in the school community. The framework known as the *Index for Inclusion* provided a mechanism in which to channel that dissonance for proactive change. By the end of the research year the service provision for students with ‘special needs’ in the school was greatly altered. Staff were able to see the presence, or lack of presence, of members of the student body. Staff were also able to apply social justice interpretations of ‘inclusion’ to other minoritised members of the school community (Berryman, *et al.*, 2010). The

changes that took place were at the level of artefact, but also at the level of underlying assumptions and beliefs. This impacted on the very culture of the school itself.

## **5.2 Changing expectations**

During the change process in the subject school expectations altered as school community members became more aware of the relationship between values and practices. One small way this manifested itself was the expectation that all staff, including the previously isolated unit teacher, would be required to attend morning staff briefings. Staff briefings were the only time during the school day when all of the teaching staff were present in the same room. It was seen by senior management as more for socialising and bonding than for making official school announcements. School leaders deliberately tried to speed through announcements when possible to afford staff more time to relax together before the start of the school day (*fieldnotes: interviews*). Traditionally the unit teacher's non-attendance would not have been an issue, and although she would frequently return to the unit immediately after the last announcement, her presence offered the possibility of more interaction with her colleagues.

Another area also consciously addressed was around the participation of the 'special needs' unit students in shared experiences, such as whole school assemblies. Once again, the absence of these students would not have previously been noted. As the year progressed it became a collective expectation that they should attend as staff were much more aware of the value of such occasions to the wellbeing of the unit students (*fieldnotes:*

*interviews*). Their absence was increasingly noticed by staff and if the students were not present other staff members would go to the 'special needs' unit to collect them.

Language was also increasingly used that reflected the new consensus. The use of the term 'inclusion' became more rooted in staff discourse in relation not only to students with special educational needs but also from various groups, such as students belonging to ethnic minorities (*fieldnotes: participant observation*). By the end of the year staff would describe a situation and even turn to me if I was participating in the conversation, and challenge more than ask: "Now, is *that* inclusion?" (*fieldnotes: participant observation*). The topics would be diverse, from the 'whanau' form class not participating in the final weeks of school 'intensives' (where students would sign up and participate in a variety of onsite and offsite activities) and instead take an annual trip to a large city on the island. Or it could be about the ethnic makeup of those on stage during the senior prizegiving, including who had been chosen as keynote speaker. The question or comment was directed at me as 'inclusion' was the reason I was in their school. What was significant was that these staff members were thinking about the concept, exploring and negotiating what it meant in their school in a variety of situations.

At the surface level of culture, where culture is seen, heard and felt through artefact and practice (as described in Chapter Two), inclusive practice became more obvious and apparent. At a deeper level, that of values and beliefs, the expectations collectively changed regarding participation and as a result more students were expected at key events and places in the school.

A visitor to the school would now see students of all abilities taking part in shared experiences, including representing the unit in a newly formed student council, because wider participation became a shared value. The development of a student council illustrates this process on an individual level. An experienced Deputy Principal (DP) interested in initiating a student council initially considered a council that did not include unit students. The feeling of the DP was that each class would send a representative. When I pointed out that not giving the unit teacher and unit students an opportunity to participate could be perceived by staff as unfair (as the participation of other teachers was required) her response was that, “They are not a form class, they are a special unit” (*fieldnotes: participant observation*). The DP was at that time not seeing the students in the unit as a complete part of the school. She suggested speaking to the unit teacher about her students participating and together we facilitated the representation of the unit in the new council. Whereas the initial response of the DP reflected an assumed attitude of ‘difference’ and separateness, through reflecting on her attitudes the DP became an advocate for unit participation. During the council meetings a student representative from the unit attended and accommodations were arranged (a note taker) so that he could bring information back to his classmates.

### **5.3 Dissonance in change**

The HOD for the learning support area of the school was initially confronted with challenging ideas and different models of learning support. What the change process created and encouraged for the HOD was dissonance (Timperley, *et al.*, 2007). Dissonance is noted in *Teacher Professional*

*Learning and Development: Best Evidence Synthesis Iteration (BES)* (Timperley, *et al.*, 2007) as playing a role in the restructuring of values, beliefs and practices. “When new information challenges previously held beliefs and values, dissonance is created. Dissonance ... challenges tacit knowledge, creates philosophical tension, and requires current knowledge to be reconstructed” (p. 13). Indeed, in three studies cited in BES that failed to impact teacher practice or student achievement, there was a lack of dissonance created for the participating teachers (Timperley, *et al.*, 2007, p. 177). Dissonance can act to problematise or make current practices problematic and bring about support for new practice. The success of this can depend on the wealth of experience the teacher has to draw upon (Timperley, *et al.*, 2007), but Hannay and Ross (2001) maintain that most professional learning requires some disequilibrium and the challenging of existing assumptions. They see a key role being played by professional sharing through,

bringing tacit beliefs to conscious scrutiny, subjecting them to external appraisal, and surfacing alternatives to one’s own practice. In defending their positions through explanation and counterargument, professionals recognise gaps in their conceptions. Through this collective process, individuals can generate and explore alternatives, and thereby reduce the cognitive dissonance (p. 331).

The HOD’s interpretation of her practice was challenged and her personal interpretation of core community or school values was experiencing tension. She was not, during this process, simply trying to adjust to a shifting consensus, she was using the dissonance created from dialogue, and the change process initiated by the *Index* process, to contribute to that changing

shared consensus. Throughout the year she continued to explore her practice, the model of support provided by her department, and the interpretation and expression of inclusion in the school. She was creatively working with the principal to alter her department's provision of services and actively exploring alternative models.

In an initial interview she expressed ideas regarding inclusion which supported the department's approach at that time:

I know the whole inclusion thing, the debate whether, you know, these kids should be in mainstream classes or in an environment like this, but I think it's nice that we cater for them. Some of them have been way more successful being ... moved in here (*fieldnotes: interviews*).

However, she also expressed some doubt, in the form of questions to me as the interview progressed. "What do *you* think?" she would check from time to time. Her questions reflected an inner suspicion that she could change the model of support provided by her department but needed time to gain confidence in her own ability and to develop her ideas.

In a more direct fashion, and questioning the widespread use of the term 'mainstream' I challenged her:

Is [the school] a mainstream school or a special school? Does it have a special school on its grounds? OK, then why don't you celebrate the fact that a 'mainstream' school can accommodate any student who comes through its doors? (*fieldnotes: interviews*)

Where this staff member was faced with the discomfort associated with dissonance and challenge she reflected on her underlying values and assumptions and actively participated in changing the shared consensus

within the school. This was not a process without discomfort or even pain. After I asked her thoughts about the older students in the Composite class being able to attend senior assemblies she chose not to discuss her practice or department with me for the next eight weeks. After a dynamic visiting speaker presented to senior students regarding life choices and the risks they as adolescents might face I asked the HOD her views. I pointed out the danger of inadvertently separating or segregating students when trying to meet their needs. As Composite class (containing students from Year 9 to Year 13) only attended junior assemblies, I provocatively asked, “When will [the older students in class] ever get to be seniors?” (*fieldnotes: participant observations*).

Admittedly, I could have been more tactful, but the dissonance caused encouraged the HOD to reflect on school practice; it planted a seed. Later in the school year the HOD related an experience she had with students from ‘the mainstream’ coming to the learning support area for help in a specific subject area, her meeting their needs after several tutorials, and the students leaving elated at their success. She was likewise elated with the experience. According to the HOD, the students were, “buzzing about it” (*fieldnotes: interviews*). While continuing to look at alternative models of support, this experience helped clarify what she was envisioning for her department: a resource for the whole school, fully part of the school which students could access when the need arose. She not only sought ways to adapt her practice and that of her department, she saw the change process as an opportunity to improve the quality of experience of her students and staff. Where this staff member was faced with the discomfort associated with dissonance and

challenge she reflected on her underlying values and assumptions and actively participated in changing the shared consensus with the school. The dissonance created by exploring the tension between current practice and the teacher's emerging beliefs led to active engagement and ownership of change (Pearson & Bell, 1993; Timperley, *et al.*, 2007).

Towards the end of the school year the building in which her department was situated was identified for a rationalisation of property within the school. A reduced student role in the previous three years meant that the Ministry of Education was going to remove the building in which her department was situated. Rather than simply reproduce the current model in a new location she was pro-actively exploring ways to re-create that department reflecting emerging interpretations of her core values and the values of the wider school community.

The process of change encouraged teachers, individually and collectively, to re-assess and re-negotiate school practices and the place of the unit within it. By highlighting inclusion, teachers were encouraged to become more aware of the presence and participation of students with special needs and their teachers. Examples were evidenced throughout the research year. During a training day on employing the South Pacific Education Curriculum (SPEC, a programme adapted from ASDAN) for students in the learning support area, the absence of the unit teacher was noted. ASDAN originated in the United Kingdom as learning programmes adaptable to a wide variety of abilities and designed to equip students with learning, employment and life skills. The SPEC adaptations produced learning resources that reflect South Pacific culture and context. "Where is [teacher]? Her students would get so

much out of this!” was one participant’s remark (*fieldnotes: participant observation*). Staff at the training began identifying specific students from the unit that would benefit from the programme and speculated about how to facilitate their participation in SPEC learning modules, as well as which staff members in the unit might be amenable to utilising the programme in their teaching. One result from the training day was more imagination about what was possible in programme development and a raising of expectations.

Absence was also noted during whole school assemblies. “Where are the students from the unit?” I asked a nearby teacher while a guest speaker addressed the students on the topic of healthy life choices. This type of interaction between staff, and between myself and participants, fostered a reflection of not only school systems and practices, but what values meant and how they were expressed. At this particular assembly a motivational speaker was invited to address students on healthy life choices. His presentation entertained and informed in a manner that effectively delivered his message. My questioning of who was there and more importantly of who was not, as well as my parting comment, caused upset to this staff member and created a dissonance between her desire for inclusion and the practice that was apparent. She later became an advocate for marginalised students in the school and ensured that inclusion was built into her department’s yearly plan.

#### **5.4 Effects on the special needs unit**

A cartoon by the educator and artist Michael Giangreco titled, “Island in the Mainstream” depicts a traditional classroom of children—rows of desks, teacher in the front sitting at her desk with a black board, etc. In the rear of

the class is another desk, set off on its own. It is actually on a small pile of sand and is occupied by one student (obviously with 'special needs' as he is sitting in a wheel chair) and a teacher's aide. All the students are facing the front except the student on this island who is facing the teacher's aide. It is clear they are doing different work from the rest of the class. The caption below the picture reads: "Mrs. Jones and Mrs. Cooper are still trying to figure out why Fred doesn't feel like part of the class" (Giangreco, 1998, p. 27). While the scenario depicted in the cartoon is all the more powerful due to its replication in so many classrooms or schools, it does not quite capture the original position of the special needs unit in many high schools. There, the student with 'special needs' would not be in the back of the class, they would be outside somewhere. The unit often forms an island outside the mainstream (McMaster, 2014a). As discussed in Chapter Four, the special needs unit at this school was traditionally set apart from 'the mainstream' of the school. Following a collective re-evaluation of how school values are expressed in practice the school redesigned its model of service provision for students with special needs and incorporated the unit into a larger school department. The unit went from being 'an island outside the mainstream' to becoming a more integral part of the school.

Carrington, Bourke and Dharan (2012) write that, "The *Index for Inclusion* begins simply, in effect becoming the Trojan Horse for change" (p. 349). Once in the school it becomes a prompt and reminder of the concept of inclusion and encourages dialogue and internal reflection around the expression of core values in school practice. The culture of a school is not a fixed entity; it is an arena of renegotiation of the interpretation and the

expression of core values. During the change process expectations alter as school community members become more aware of the relationship between values and practices. Where the consensus is expressed among community members, the places where staff interact with each other, becomes an arena of change while newer interpretations of values are explored.

For the staff of the special needs unit, the definition of ‘caring’ similarly faced tension with the wider interpretation of that core value. When the unit was originally designed in the 1980s, the unit was set apart from the mainstream school, and this reflected the urge on the part of the school, at that time, to provide a nurturing environment and to ‘protect’ students with disabilities. This conception of ‘caring’ was still strong among unit staff. When the idea of more individualised scheduling was brought up with one teacher’s aide and the willingness of a teacher to take one of the unit students in her mainstream class, the response was one of concern, “What, so he could be isolated and embarrassed?” (*fieldnotes: interviews*). Her view was that the special needs unit protected the students from possible teasing and shame. The participation during sports day that I facilitated early in the year (discussed below) similarly caused upset to another aide. This was the first time in school memory that students with special needs participated in this shared experience. She saw my encouragement of an older student to ‘give it a go’ in the social sports as stigmatising to the student, as potentially publically embarrassing him, as highlighting his differences not only to his peers but to himself (*fieldnotes: participant observation*). Though based on a desire to ‘protect’, this interpretation held student difference to be something

needing protection, rather than something natural, or as a strength to be celebrated.

The core values expressed by the staff at the subject school, values upon which they based a collective identity, was that the school was a caring place that met the needs of all of the school's students (*fieldnotes: participant observation*). What staff began to review was *how* the school met student needs, what was meant by the word 'all', as well as how the word 'caring' was defined. During the sixth week of the school and immediately after the *Index for Inclusion* was introduced to the full staff team, the school held a sports day. This event was a first in many ways. The Head of Department for Physical Education, dissatisfied with previous sports days (*fieldnotes: interviews*), planned an event that all students could participate in. There were options for students wishing to compete and for students simply wanting to participate. The participation of the students from the unit was facilitated by myself. I took the students, and the teacher aides assigned to them, from station to station, advocating where necessary to ensure participation was possible. If the students wanted to, they ran in the fun run with all the other students. They threw the shot put, as well as the javelin. This sports day was the first in which students from the unit participated and staff (as well as students) were able to not only share the experience with them, but normalise their presence in 'the mainstream'. The importance of shared experiences in the development of inclusive cultures will be discussed more fully in Chapter Six.

Previously, the marginalisation of the students within the unit was accepted as the norm, it was not noticed as marginalisation. The focus on

inclusion encouraged by the *Index* process, and the role of the researcher as advocate, encouraged staff to notice who was participating and who was not. Daily morning staff briefings, for example, were held and the absence of the unit teacher was noticed. Whole school assemblies were held and the issue of the attendance of the students from the unit was increasingly considered. The first opportunity to ensure their attendance at assembly came during a whole school practice of the new school haka. Noticing that neither the students from the unit nor their teacher were present, the Principal sent two teachers, an art teacher who worked with unit students (and the creator of the haka) as well as the teacher from Composite class, to collect them (*fieldnotes: participant observation*). In the following week's assembly unit students were given awards for their participation in Special Olympics. For the remainder of the year, if the students from the unit were not present at whole school gatherings their absence was noticed and teachers would voluntarily walk to the unit to collect them. The process of change encouraged teachers, individually and collectively, to re-assess school practices and the place of the unit within it. By highlighting inclusion, teachers were encouraged to become more aware of the presence and participation of students with 'special needs'.

### **5.5 Experience and reflection leading to change**

These changing expectations evolved into changing practice. Through initiating and sustaining a dialogue around inclusion in the school community, staff members and students became more aware of individuals and areas of the school that have traditionally been neglected or overlooked. The term 'inclusion' was able to move from 'jargon' (as it was referred by

one participant early in the year) to common discourse. “It’s simple, just do it,” remarked one teacher during a staff meeting about the inclusion of students with special needs (*fieldnotes: participant observation*). Part of simply ‘doing it’ involved the increased inclusion of unit students into ‘the mainstream’. As considerations about inclusion went from thinking about the students as a special class rotating as a cohort to various option teachers, to thinking about the students as individuals, more teachers were willing to invite the students into their classes. This developed slowly in term three as schedules that were identical (all unit students following the same programme) were converted to more individualised schedules. In one situation a specific programme was linked to a specific student, who left the unit for two periods on a Wednesday and attended Composite class in the learning support area to work with a teacher aide and a literacy software programme. Although not in an area that was considered ‘the mainstream’ this was the first example of individualised programming. Another example, this time involving a ‘mainstream’ teacher, was matching one student interested in photography with the photography teacher. The Principal of the school acted as broker and advocate to make this happen. The ongoing dialogue around inclusion made such brokerage easier as each teacher had a growing understanding of inclusion and were involved in improving the practice of the school.

On an individual level, the experience of ‘doing it’ led to teacher growth, the diminishing of teacher reluctance to embrace inclusionary practices and a willingness to continue to develop their practice and experiment with teaching strategies. This aligns with the findings in *BES* for

professional learning and development (Timperley, *et al.*, 2007) which cites research that finds,

that once teachers have used new teaching approaches with their own students and seen the positive impact on achievement, most become convinced of the value of the new learning and also of their own agency in their students' learning outcomes (p. 152).

Physical Education (PE) teachers were handed the opportunity to 'do it' when a colleague was away for an extended period time at the beginning of Term

3. This teacher's replacement looked forward to the opportunity.

*Fieldnotes:* Asked [teacher] at briefing if she was going to continue to teach PE to the unit. She said "Oh, yeah!" and got excited about what she is learning about teaching. She said that "you have to have three activities, not just one" and she shared this with her colleagues. She said she took them for a walk but that was just one activity—they then went to the gym and she used the buckets that are used to store gear and put numbers next them and the students threw balls to try to get them inside. She used different types of balls. "What a great way to assess their ability and needs as well," I said, and she agreed.

Another colleague in the Physical Education Department had a similar opportunity to take the PE classes of the composite class from the learning support area. In her first session with the class she informed them that they would need be ready and have their PE kit on. "If you are going to be included you need to follow the same rules," she told them. The following day she expressed how previous dialogue and examples of inclusion encouraged her to find creative strategies in making her lessons more effective.

*Fieldnotes:* [teacher] was sitting next to me in the staff room and she told me about how she has been dealing with [a student's] energy—having him run like the others but carrying a punching bag. He really likes that, being able to use his strength. She was proud of herself for thinking of a creative solution to include him in the PE lesson.

Through experiencing success these teachers increased their confidence in their teaching abilities, and the change they experienced was more sustainable.

## **5.6 School values re-evaluated**

As discussed above, there was a growing consensus about the participation of all students in whole school events. The school first experienced this at the beginning of the year with the sports day. That day presented a shared experience where teachers and students alike could participate in an inclusive manner. As a result, staff became increasingly aware of who participated and who did not. Teachers were no longer willing to let colleagues opt out of shared experiences. By the very end of term each of the three whole school assemblies were attended by unit students. The unit teacher's absence at the end of term assembly, where all staff performed the school haka for the students, was not only noticed but followed up after the school break with a meeting with the Principal. This meeting was not only a chance to reinforce the expectation of full participation in school events (as well as teacher involvement in daily staff briefings) but to lay further groundwork for changes in practice. Non-participation by a staff member or a group of students, which was previously considered a norm, was increasingly seen as unacceptable.

With the change in attitudes also came reflections on practices of how Individual Education Plans were used. Staff were able to comment that they had or had not seen an IEP, express confusion about the purpose of such a

document and offer suggestions about accessing them to inform practice. The allocation of resources became a focus in linking students with option classes, individual goals and the support needed to make change happen. The role of teacher aides and teacher management and responsibility for teacher aides became the subject of professional development as the school took advantage of training modules being offered by the Ministry of Education (2013c). For an eight week period the school trialled the modules and offered feedback to researchers on their efficacy. Here attitudes and practices influenced how systems were organised in the school, not just the management of IEPs but also the management, allocation and expectations of teacher aide use.

Resource allocation and organisation similarly came under discussion as school staff began to reflect on their current model. The question posed by school leaders during a whole staff meeting was, “What is the best way to serve all of our students?” An increased notion of who ‘all’ was, meant that separate departments, such as the learning support area, the special needs unit, the English as a Second Language (ESOL) and reading department needed to improve coordination and resource use. The planned demolition of the building housing the learning support department gave an extra impetus for change.

### ***Conflicting interpretations***

Later in the year the Principal expressed how the school’s interpretation of ‘caring’ and a ‘place for all’ had moved on. “We segregated students thinking we were protecting them, it was done with good intentions but produced wrong results,” (*fieldnotes: interviews*). The consensus about how the school interpreted ‘caring’ was being renegotiated, no longer meaning what the staff

in the unit held it to mean. The result was that the underlying beliefs of the unit staff were increasingly out of sync with the values of the wider school community. Several changes to the practice of the unit were instituted throughout the year, as outlined in Chapter Four. These included expectations of attendance at staff briefings; expectations of participation by unit staff and students at shared experiences; attendance in options classes as individuals rather than a 'cohort'; membership in student council; conscious and deliberate planning of shared events; increased expectations of key roles, such as SENCO; and an impatience for change/ an increased desire for change on the part of staff. In the underlying layers of culture are found the assumptions on which a culture is based. These assumptions are often not clearly expressed or articulated. It is the 'hidden dimension' on which a culture is grounded (Hall, 1966, 1990). During the process of change at the subject school staff undertook an examination of the assumptions and beliefs shaping the school identity. Chief among these was the interpretation of 'caring' and 'a place for all'. Although assumptions and beliefs are very individual by nature, the coming together of many individuals that constitute a shared culture is a dynamic zone of negotiation and renegotiation. Tension is created as values evolve and as members begin to question and examine the underlying assumptions that shape the community.

The interpretation of core school values by the unit teacher regarding her responsibilities towards the students of the special needs unit meant that change was not carried out as desired, causing frustration among her colleagues as well school leaders (*fieldnotes: interviews/participant observation*). As the year drew to a close the school underwent a process of

aligning staff levels to student numbers, known as Curriculum and Pastoral Needs Analysis (CAPNA) (Ministry of Education, 2013b) which resulted in several teaching positions being lost. CAPNA is designed to be a very strict process carried out in consultation with the teachers' union (PPTA, 2009). The unit teacher's position was one of the posts rationalised and she took the opportunity to retire from teaching.

In regards to the staff of the special needs unit, their interpretation of school values also meant that they were increasingly out of accord with the evolving interpretation of core school values. This new interpretation ultimately found the expression of school values, as evidenced through the practice of the special needs unit, incompatible with what was now "the [school] way." It was decided by school leaders that beginning in the next academic year the students of the special needs unit would be members of the learning support area and the special needs unit itself would only be used as an educational resource. Furthermore, the HOD of Learning Support would design a department that provided service to any students in the school requiring assistance. Her vision was as the students from the special needs unit would become more integrated in to 'the mainstream', so too would the learning support department. Indeed, following a sustained period of reflection and experience in the school the meaning of the word 'mainstream' was undergoing continued exploration, and the nature of what constituted 'the mainstream' in practice was similarly evolving.

The special needs unit at the subject school, as well as units elsewhere, can potentially enable a student to attend their local school no matter what their physical or intellectual need. Units can provide a practical

learning environment that incorporates life skills as well as meet the many physical needs that students may present. Ministry of Education funding has equipped units with ramps, wheel chair accessible entrances, hoists, and other vital equipment (Ministry of Education, 2013a). Indeed, the presence of a special needs unit can mean that no impairment can prevent attendance at a mainstream school. There is great potential in the special needs unit in facilitating inclusion, when the diverse needs of all students are met within an equitable and accepting education system (Ballard, 2004; MacArthur, *et al.*, 2005; Slee, 2001a, 2011). This research illustrates how a school community can tap that potential through reflection and planning. In viewing inclusion as an issue of values and attitudes, the primary focus becomes how the individual student is valued in his or her local school, how teachers and peers reflect their appreciation and respect for that individual through their relationships with them, and the quality of their participation in the life of the school.

As MacArthur, Kelly and Higgins write, “Context is crucial—what schools and teachers do to support students with disabilities makes a difference to their lives” (2005, p. 55). An early perception of several teachers in the subject school was that inclusion involved removing special settings and ‘including’ all students in ‘mainstream’ classes. However, this is confusing inclusion with service provision—how additional needs are met. How the special needs unit is utilised is where inclusion *or* segregation can happen. The danger inherent in establishing a separate learning environment alongside ‘regular’ or ‘mainstream’ education is that some students will be segregated from their peers (MacArthur, *et al.*, 2005). This was seen to be the

case with the establishment of the special needs unit at the subject school. Through re-evaluating their interpretation of inclusion and redesigning their service provision, and through an emphasis on relationships between students and teachers, the subject school re-conceptualised ‘the unit’ within their school. In this way, as will be discussed further in Chapter Six, the subject school has aspired to improve their practice and create a ‘world class inclusive education system’ based on a deeper understanding of ‘inclusion’.

### **5.7 Redrawing maps**

The process of exploration and experience of core values, assumptions and beliefs necessitated reviewing not only the provision of services but also the meaning of ‘mainstream’. During the final three weeks of the school year when staff worked across departmental barriers and students worked outside of form classes or year groupings there was, in an important way, no sense of ‘mainstream’. This shared experience will be discussed in more detail in Chapter Six. What is important to note here is that during that time there was no sense of ‘mainstream’ as there were no systemic demarcations between departments or students. Learning support area teachers and students worked and learned side by side teachers and students from the whanau or Māori departments. Science teachers worked and learned alongside Maths, English or Technology teachers. Each teacher was able to watch their colleagues working with diverse students and gain a renewed respect for that colleague as well as the importance of their subject (*fieldnotes: participant observation*). Similarly, students from form classes considered ‘extension’ or ‘immersion’ were able to work and learn together.

The learning experience of the final three weeks of school (discussed in Chapter Six) exemplifies the direction that the map of the school was beginning to take as a result of the change process. An original conception presented in this thesis was a mind map consisting of school areas linked or tethered to a core ‘mainstream’ which contained the mainstream academic departments. Some subjects were highlighted, such as subjects referred to by some staff as ‘the protectorate’: Math, Science and English. These subjects have been traditionally protected from staff cuts or programme reductions (*fieldnotes: interviews*). Outside of this ‘mainstream’ floated the departments devoted to student supports: the learning support area, the special needs unit, reading remediation, even to a degree the Māori department and the whanau/immersion form class. However, during the re-negotiation of school values the place of each area and department was re-examined. Those perceived as ‘on the inside’ were able to look outward, considering who was participating and who was not, for example. Those perceived as ‘on the outside’ were similarly able to reflect on their perceived position and proactively assert their views on not only what they thought the school should look like, but how they thought core school values should be expressed.

To the HOD Māori, renegotiation meant advocacy for her students and her department (*fieldnotes: interviews*). The Māori Department consists of a ‘whanau’ cohort of students made up of students coming to the school from immersion settings, mostly the surrounding kura kaupapa schools. Her negotiations with ‘mainstream’ teachers met with some initial resistance, and some continued resistance, as she attempted to explore with them her concept of ‘infusion.’ Infusion’, to the HOD, was infusing mainstream subjects, such

as mathematics and science, with Tikanga Māori (essential aspects of Māori beliefs and culture). The purpose of this would be to ‘infuse’ curricular subjects with more relevance and authenticity for her, as well as other, students. Rather than attach the Māori department to a model of ‘mainstream’, she has been pulling at the boundaries of that concept, stretching the boundaries to accommodate her department, her interpretation of inclusion, and her vision of what the school can become. Her aim is not assimilating the department into a ‘mainstream’ but changing the interpretation of what is ‘mainstream’. “Māori have been assimilating for 150 years, they have been really good at it and you can see how far that has gotten them” she maintained. “Nah, it’s time they came to us as well” (*fieldnotes: interviews*). Inclusion, to her, was synonymous with Te Kotahitanga, a concept that is a fundamental part of her world view. Te Kotahitanga means ‘unity of purpose’ or ‘unity through self-determination’ (Berryman, *et al.*, 2010). Te Kotahitanga is an educational reform project aimed at improving educational achievement of Māori students in secondary schools, but her reference to the term also invoked the movement by the same name in the late 19<sup>th</sup> century that emphasised Māori self-determination. She would like to make the Treaty more prominent in the school and thereby help make the system more inclusive for Māori students. By grabbing the boundary of ‘the mainstream’ and pulling it outward she has combined advocacy with a vision that is grounded in social justice.

This stretching of the idea of ‘mainstream’ was similarly behind the efforts of the Learning Support HOD to redesign that department. With the loss of the special needs unit teacher as a result of the CAPNA process, the

unit students became students of the learning support department and the responsibilities of Special Educational Needs Coordinator (SENCO) fell to her. After exploring options and experiencing working different ways throughout the year, she was confident at year's end to change practice. Her ideas included students attending different form classes (the first 30 minutes of every school day) to increase integration in 'the mainstream' and encourage the building of meaningful relationships between students and teachers; tailoring schedules to individual interests and needs; utilising the physical structure of the special needs unit building as a learning resource to benefit all students; and utilising the surrounding community to develop life skills and develop relationships that would benefit transition from the school setting. She additionally sought to offer her department as a resource to be accessed by any student requiring assistance, whatever their level of need, and to form close ties with the ESOL and Māori departments.

The map of the school that emerges from a year of reflection and re-negotiation becomes one more resembling a lumpy circle than a planet surrounded by satellites as presented in Chapter 4. The lumpy parts and the arrows represent the pulling and pushing of departments or individuals trying to expand the notion of 'mainstream'; a dynamic or a tension that makes inclusion possible and makes the school culture a place where inclusive change is possible. The Māori department insists that the 'mainstream' come to them. The learning support department expands the notion of what is 'mainstream'. The reading department exerts its importance and collaborates more with existing subject departments. The ICT department puts forward new ideas and practices in delivering its curriculum content. What is being

adjusted in this dynamic is the ‘centre’, to acknowledge different centres and create a culture where different centres can co-exist and strengthen the whole. Rather than move from an apparent exteriority, this conceptualisation shows the school community viewing ‘inclusion’ as more than an issue concerning those marginalised or on ‘the outside’ (Graham & Slee, 2008). Inclusion involved a reassessment of the centre.

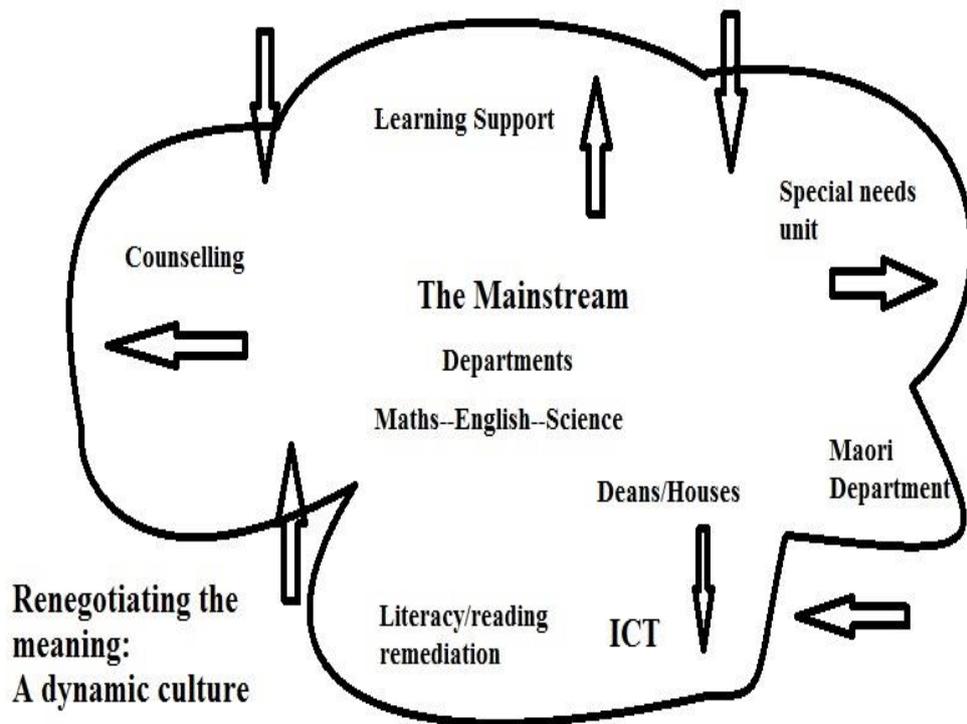


Figure 3: Reconceptualised map of school

### 5. 8 Types of change encouraged through the Index process

The types of planning encouraged through the framework for change known as the *Index for Inclusion* was reflected in the staff’s approach to planning which resulted in change that can be categorised at three different levels:

systemic, practical (having to do with practice) and attitudinal. Each of these fed into and strengthened change, or the impulse for change, in the other areas. Attitudinal change included an increased awareness of ‘inclusion’ and ‘exclusion’. While initiating and sustaining a dialogue around inclusion in the school community staff members and students became more aware of individuals and areas of the school that have traditionally been neglected or overlooked. In this way the discourse of inclusion shone a spot light on areas that had previously been in the dark, into the “blind spots”, as the Principal referred to areas of practice he was not aware of in his first year in the post (*fieldnotes: interviews*). With inclusive values in mind the planning for both improved practice and systemic reforms became more conscious; the reasoning behind why action was being planned or taken became more focused.

Attitudinal, practical and systemic change cannot be so neatly separated as each feeds the development of the other. Changes in attitude are reflected in changes in practice, which allows for further changes in attitude. Systemic change comes as a result of changes in attitude and practice, as well as enabling and contributing to further change. This ‘change engine’ can lead to change in the surface level—the level of artefact or aspects of culture that are visible to the visitor. This change process similarly influences a deeper level of the shared culture, the largely unspoken consensus about what are the acceptable boundaries of discourse. Ultimately the process can potentially influence the deeper individual beliefs and assumptions upon which the organisational culture is built, resulting in alterations to the very institution itself.

*Types of change*

Changes to systems	Changes to practice	Changes to attitudes
<ul style="list-style-type: none"> <li>• Departmental planning: building inclusion into departmental review, e.g. ICT</li> <li>• Designing models of support—coordinating resources and maximising the efficiency of use</li> <li>• Role of the SENCO as a position of responsibility in the school</li> <li>• Re-allocation of SENCO position</li> <li>• Designing class arrangements in light of structural changes</li> <li>• Incorporating student voice through a student council</li> <li>• Incorporating the special needs unit into the learning support area</li> </ul>	<ul style="list-style-type: none"> <li>• Increased inclusion of students into the ‘mainstream’</li> <li>• Attendance in options classes as individuals rather than ‘special class’</li> <li>• Membership in student council</li> <li>• Participation and attendance at whole school events (sports day, assemblies, displays, etc)</li> <li>• Role of the Teacher Aid and the responsibility of the teacher (PD modules: training opportunities taken)</li> <li>• Conscious and deliberate planning of shared events</li> <li>• Increased transparency of practice—former shadows of practice (e.g. special needs unit and teachers work with unit students) being recognised</li> <li>• Use of IEPs, accessibility, ownership and usefulness of the document</li> </ul>	<ul style="list-style-type: none"> <li>• Participation being expected and non-participation being noticed</li> <li>• Attending to inclusion in planning shared events</li> <li>• Increased expectations of key roles, such as SENCO</li> <li>• Awareness of inclusion; vocabulary and discourse becoming ‘mainstream’</li> <li>• Impatience for change/ an increased desire for change</li> </ul>

**Table 2: Types of change**

## **5.9 Chapter discussion: renegotiation in the zone of school culture**

During the final three weeks of the academic year the school reorganised its schedule to enable students to work in their house groups around projects designed with and by them. Within this school wide experiment the participation of the students from the special needs unit was taken for granted. The teachers from the house in which the unit students belonged planned groupings that would see the unit students working with a variety of peers in a variety of groupings. The special needs unit teacher offered a compromise in opening the unit for student use during the final three weeks. “It doesn’t always have to be about us going to them but can be about them coming to us,” she said (*fieldnotes: interviews*). Whereas the year began with the special needs unit and the staff there isolated within the school, as the year ended the unit teacher was collaboratively planning with colleagues, offering the unit as a resource for other students and staff and exploring the possibilities of more meaningful relationships between ‘mainstream’ students and the students of the unit.

Utilising a framework for change, such as the *Index for Inclusion*, staff were able to reflect on how core values, assumptions and beliefs were understood and enacted in the school culture. Deeper values, such as the meaning of ‘caring’ and of having ‘a place for every student’ that lie at the ‘lower layers’ of a model of culture, were explored (and continue to be explored) under the ‘surface’ of school artefacts. It is this tension created through the examining of deeper values and the interaction between

individual interpretations of shared values that makes creativity within culture, and the development of cultural values, possible. The relationships between cultural members becomes more than pedagogic, it becomes a critical pedagogy (Giroux, 2011), where critical is understood to be a questioning of ‘common sense’. The receptive culture becomes the ‘shady place’, a dynamic place, where change can occur.

A culture of inclusion is based on core values, beliefs and assumptions, rooted in the individual (who reflects wider societal values, beliefs and assumptions). As the school is part of a wider society, the culture of the school will reflect wider societal values. The school, being a temporal culture in the sense that its members enter and exit at specific times in the day, and being spatially limited or focussed around the school buildings and grounds, is an arena of negotiation and renegotiation as to how those values, assumptions and beliefs are collectively articulated and demonstrated in practice. In this sense, the key to improving the inclusive nature of schools is to reflect on the core values of a school culture and collectively explore, negotiate, and experiment with the expression of those core values within the school.

To explore deeper values and to experiment and to adjust with changes in practice requires time. Research noted in *BES* (Timperley, *et al.*, 2007) has indicated that change is more sustained when teachers are given time to explore ideas and integrate them into practice. In order to foster the sustained development of inclusive cultures in schools it is vital to understand the nature of change within school culture, and to provide the time to reflect on deeply held beliefs. These deeply held beliefs are what make each school

an expression of the individuals in it. Rather than a 'change' in culture, the tension created through reflection, through negotiation and renegotiation represents a 'development' of culture, emphasising what is best within that culture. Through doing so, the artefacts of the school, including practice and behaviour that can be observed as 'inclusive', will be a reflection of those deeply held beliefs. In this way inclusion in schools will not only continue to develop but become embedded within the culture of school and the values of the individual.

The following chapter will focus more on the individual in the process of inclusive development. Through the experiences of the varied staff members participating in this research many 'elements' of inclusion have been identified. Through expressing these elements in the renegotiation of their values and beliefs the foundations of a more inclusive culture was laid. The following chapter will also involve an expanded discussion of the school leader as an important ingredient to inclusive change. In their review of inclusion in New Zealand school, ERO identified the role committed leadership can play in creating more inclusive learning environments (2010). During the research year the Principal of the subject school played a key role in encouraging change and his experience offers important findings that can benefit other school leaders.

# Chapter 6: “Just do it”: Experiencing inclusion

## 6.1 Introduction

This chapter will discuss essential core *elements* of inclusion that enable inclusive change, as demonstrated through the experiences of the school staff. These elements were relationships, advocacy, a sense of identity, shared experiences and transparency. Each of these elements worked to strengthen the effort to develop inclusion in the subject school. These elements fuelled inclusive change in an ever-enlarging spiral—the more they were developed, the stronger were the foundations (referred to in Chapter One as essential aspects) for inclusive change, and the more pronounced these core elements became. Woven through these elements was the notion of transparency. Transparency involved the ability to see how values and beliefs were demonstrated within the school. This improved vision allowed community members to see who was included or who was excluded. These core elements offer to other schools a deeper understanding of inclusion and how inclusive values can be strengthened within their communities.

The ability of the school community to co-create meaning through experience and reflection highlights the potentiality of developing inclusive schools. An important ingredient in that co-creation is leadership committed to building inclusive cultures (Ainscow, 2008; Cavanagh, 2008; Education

Review Office, 2010; MacArthur, 2009). This chapter is also the story of the experience of one school leader committed to fostering inclusive values and practices within his school. Utilising the *Index for Inclusion* as a framework for change the school leader was given the ability to direct the change process, support the dissonance created when older beliefs and values were questioned and maximise the time required for staff to reflect on key ideas and current practice. Additional benefits included incidental learning that the ongoing dialogue encouraged. This experience also indicated potential inhibitors to inclusive change that school leaders would have to work within or around in order foster inclusion in their schools.

## **6.2 Elements of inclusion**

The part of the school community that has been the primary focus of this study has been the staff team—how the staff have examined the meaning of core values like ‘caring’ and ‘a place for all’, renegotiating amongst and within themselves what was ‘normal’, what was accepted, what was not accepted and what practices reflected their growing interpretation of those core values. In exploring the nature of inclusion they contributed to a deeper understanding of that concept. The findings discussed in the following section highlight *elements* of inclusion that create the context for meaningful inclusion to take root. These elements include the most basic aspect of a community—who is considered a part of that community, and who is not (Ainscow & Miles, 2008; Graham & Slee, 2008; Slee & Allan, 2001).

Five essential elements have emerged in looking at inclusion: relationships, advocacy, a sense of identity, shared experiences and

transparency. Although treated separately for analytical purposes in this chapter they all intertwine in reality. Each core element makes up a vital part of school members' efforts to create sustainable inclusive change.

### ***Relationships***

The most obvious of the elements listed above is perhaps relationships—inclusion boiled down to the most basic of questions: Do I know you? Knowing an individual brings that person to our consciousness. Through knowing them we form a bond and through this bond we demonstrate respect and show care. When entering a crowded room, such as a school assembly, a quick look around the group will tell us if those we know are present or absent. Through developing a relationship with the students of the unit and learning support classes in the subject school I was easily able to spot their non-participation during school presentations. “\_\_\_\_\_ would really enjoy this!” “\_\_\_\_\_ sure would get a lot out of this motivational speaker!” Because those students were known to me I was able to think those thoughts (thoughts that now include them). Had I not known those students I would have enjoyed the events with those around me, unfettered by a sense of loss or guilt or anger that my friends were not invited.

The more a teacher widens their circle of relationships with students the more their sense of ‘ownership’, or responsibility towards students increases. If a small group of students are not known to them then they may feel no responsibility towards them. There is no emotional or even professional attachment as they have no, or very limited, interaction with them. It is very possible that the longer a teacher has taught at a school the

more students they become familiar with. A teacher in the ‘mainstream’ will have a greater opportunity to develop relationships with (primarily) ‘mainstream’ students. How are these relationships defined? How do the teachers identify the students as well as identify or relate to them? How well do they know a student if the interaction is limited to specific time periods during the week? This, of course, is difficult to measure but interactions outside of these periods can be an indicator. An important factor in this interaction is the amount of time or opportunity that an individual student has to participate in the general ‘mainstream’ life of the school.

A perception of several teachers was that inclusion involved removing special settings and ‘including’ all students in ‘mainstream’ classes. A Resource Teacher: Learning and Behaviour (RTL) working with the school spoke of teacher frustration elsewhere at having such a diverse ability range in their classes, of facing real exhaustion at trying to meet all student needs as professionally as possible. “Real exhaustion,” he reiterated (*fieldnotes: participant observations*). This is confusing inclusion with service provision—how additional needs are met. An occupational therapist (OT) told of one girl at another school who is ‘included’ in a class with her peers for two hours each day. “All she does is wander around the class the whole time—that isn’t inclusion.” I had to agree. That is an example of service provision, how additional needs are, or not, met. Viewing inclusion as an issue of values and attitudes, the primary focus becomes how the individual student is valued in his or her local school, how teachers and peers reflect their appreciation and respect for that individual through their relationships with them.

In that OT's experience, schools with a unit provided more opportunity for inclusion. The provision of services was met through the additional classroom and a quality participation in school life was made possible. As discussed in Chapter Five, the unit can enable all students, regardless of need, to attend the local school. This presence is guaranteed through a certain model of service provision. However, presence is not enough. Without increasing participation in the general life of the school it is not even 'integration', and definitely not 'mainstreaming', to borrow a very old term. An essential element in making any type of inclusion successful is the ability of teachers and students to weave relationships. Through relationships we identify with and value the other, we notice their absence or exclusion, and we look for ways to include them. We widen our circle to include them.

### ***Advocacy***

Advocacy, whether self-advocacy or that provided by another, is another essential element that facilitates inclusion. There is a student at the school who utilises a prosthetic leg, and as such fits many definitions of 'disabled'. However, this student can advocate for herself and has ensured that she receives no special treatment, no separate placement, and no additional supports except supports requested specifically by her. The student reminded me of my own daughter, as recounted in the introduction of this thesis, who very strongly advocated that she be removed from the English equivalent of ORS. She did not consider herself to be 'disabled' or 'special'. Once she was removed from that funding scheme and received no additional supports she became just another student and experienced 'inclusion'. That this self-

advocacy was respected by the teaching staff contributed to the self-confidence and empowerment of the student and is consistent with United Nations Convention on the Rights of the Child (United Nations, 1989) and the United Nations Convention on the Rights of Persons with Disabilities (United Nations, 2006).

A student without a perceived disability is known by her name, not her class, such as a ‘learning support’ student or ‘one of [unit teacher’s]’. The later description was overheard when a young lad with autism walked into the administration block. A senior staff member tried to explain his presence to a bemused colleague. “He is one of [unit teacher’s],” had the ring of explanation. I used the opportunity to say hello to the boy and extend a hand which he promptly shook. When he had walked past, a teacher asked what his green flag was for and I was able to explain that after watching the stock cars on a previous evening, waving the flag and starting a race is one of his favourite activities. On that occasion I was able to use the experience to normalise a relationship and advocate quietly for the student (*fieldnotes: participant observations*).

Lack of advocacy not only results in non-participation but in the lack of voice. Without an advocate to push for inclusion, and lacking the skills to effectively speak for oneself, a situation of exclusion more readily emerges. For example, one way that this can occur is if there is a lack of response to students who experience communication challenges. This can result in exclusion from the curriculum and from social relationships. Impairments can be turned into disabilities if no effective means of communication are provided. This is similarly likely if there is no one to advocate for the student,

to notice the absence of students at school events, or no person to query that absence or to encourage, even demand, more meaningful participation. Advocacy in a school where the culture is one of ownership by all the teachers can be seen as a vigilance (Cologon, 2013). This is what Kugelmass (2006) refers to as an uncompromising commitment and belief in inclusion. In such a case advocacy is not limited to one teacher aide or teacher, but a shared responsibility.

### ***Sense of identity***

In departments or units that have a strong sense of identity there is a linking of advocacy and experience. The learning support area of the school, comprising four classrooms, has been working deliberately to foster a sense of identity and shared focus. The four teachers use their weekly meeting (held during Friday form period in all departments) to plan forward as well as bond as a team. The weekly assembly held in the library for all the students of the four classes provides an opportunity to share success, offer praise and build esteem. The parent consultation evening was held this year in the learning support area itself (rather than in the crowded hall where teachers sit at individual tables) and parental participation increased markedly. The Head of Department is consciously trying to ensure the full participation of the learning support students in the curriculum, advocates strongly for learning support students, with varying degrees of success, to have access to subjects such as science, and is creatively looking at how to incorporate her department more fully and reciprocally into the life of the school (*fieldnotes: participant observations*).

As discussed in Chapters Four, Five and Six, the subject school in which my research took place also maintains a unit for students with high and complex needs. Separate units can make a powerful physical statement about who is 'in' and who is 'out' in any community (Slee, 2011). Separate or special locations for specific students can imply that students placed in a unit do not fit in with what is considered 'normal' or 'regular'. The presence of a special needs unit, however, can mean that no impairment can prevent attendance at a mainstream school. There is great potential in the special needs unit in facilitating inclusion. How the special needs unit is utilised is where inclusion or segregation can happen (McMaster, 2014a). Having worked previously with units possessing a strong sense of identity I have seen what can be achieved when it is fostered. A unit in a high school in another area, for example, recreated itself, name and all, in an effort to integrate more fully into the life of school. The teacher was a tireless advocate, utilising the resources and relationships of the school as well as outside sources such as CCS, RTLB, and Ministry of Education: Special Education. Student voice was made central to practice and planning, outside advocacy was accessed to ensure student wishes and goals were met. Each student had an individualised schedule to meet their needs and desires, and they and their families/whanau played a significant role in creating their schedules. Here is an example of the inter-relatedness of this sense of identity with advocacy, relationships and shared experiences and a reflection of aspects of culture identified by Kugelmass (2006) as necessary for sustaining inclusive cultures in schools, such as a commitment to inclusion, difference seen as a resource, collaboration, and a willingness to persevere to sustain practice. Where the

sense of identity is strong there is more confidence in advocacy, there are more opportunities to share in experience, and more relationships are formed. When it is lacking, isolation and exclusion become the norm.

### *Shared experiences*

Were the participation of all students normalised then their presence would be expected. Inclusion, in other words, would be the norm or the common place. The school community sharing in experiences becomes not only what is expected; it is what the community is used to. Shared experiences, doing and celebrating together, creates a familiarity in which those unknown become known. Shared experiences, such as whole school sports day as discussed in Chapter Five, a water sports day, an art exhibit featuring a wide variety of student art, creates a space in which community members are able to be with each other in non-threatening or non-judgemental circumstances. Every school week or term provides such occasions, and every school term affords enough time to plan and create such celebrations. The more experiences are shared, the more familiar faces become, the more known community members become.

Unfamiliarity can be the cause of awkwardness. Standing in the playground and speaking with a staff member on a sunny autumn afternoon a student from the unit came up to us (*fieldnotes: participant observations*). He was in good spirits and we began chatting. It turned out the staff member was related in a second cousin or distant aunty way and that the staff member knew his mother. The two spoke for a few moments about family before the bell rang. “I may have been asking the wrong questions,” the teacher said to me as if there might be a ‘special way’ to talk. She seemed unsure about how

the conversation went. She was only unsure because she had conversed so little with him in the past. She mentioned some early concerns his mother had about his education. Hopefully, I thought, simply sharing a short conversation would contribute to breaking down some inhibitions in the future and more conversations will occur.

### ***Transparency***

Running throughout each of these elements is the notion of transparency. Transparency, in this sense, is seeing what is present, but also seeing what is not. With an increased awareness of inclusion (and its flip side, exclusion), how values are put into practice in a school community become more visible. An essential element of whole school re-culturing programmes such as the *Index for Inclusion* involve a period of self-review and reflection, of making the school community, its values and aspirations, more transparent. For the advocate and for the self-advocate, this means being able to see what is not present and having a vision of what is desired. To develop relationships it means being able to see the ‘other’ and bring them into a widening circle of friendships. During shared experiences it becomes clear who and who is not participating. Creating and strengthening a sense of identity requires being able to see oneself and one’s department or unit as an entity deserving of worth.

### **6.3 Creating a shared experience**

The final three weeks of the school year provided an opportunity to put new expectations to use and develop the understanding behind them through a shared experience involving both staff and students. This experience

contained key aspects of what have been identified as best practice for teacher professional learning and development (Timperley, *et al.*, 2007). Staff and students were given the opportunity and time to explore ideas and integrate them into practice. Following the last exam, the school year for the senior (Year 11 to 13) students was over. Left on campus were the Year 9 and 10 students. Rather than continue with a normal schedule of class periods during these weeks the principal and deputy principal put forward the idea of grouping the remaining students into their house groups and planning, with the students, high interest learning activities centred around the Key Competencies found in the New Zealand Curriculum (Ministry of Education, 2007). The New Zealand Curriculum considers Key Competencies the “capabilities people need in order to live, learn, work and contribute as active members of their community” (p. 11). These competencies are identified as managing self; relating to others; participating and contributing, thinking; and using language, symbols, and texts. The question posed by the principal and deputy principal was how to incorporate those Key Competencies into a learning programme that was ‘inclusive and responsive’.

Part of the importance of the three week project lie in expressing current values in a shared experience. Each house group encouraged student participation in planning the three weeks. All form teachers, including the unit teacher through the teacher aides, helped inform planning by asking students their interests. Student voice was then woven into what the house teachers collaboratively designed for the end of year project. Planning for the three weeks included all house teachers working together, and for the unit teacher and her colleagues it was the first time they had collaborated in such a manner.

The house in which they were members used the *Index for Inclusion* to inform their planning. Ideas were explored, passed around, altered. The participation of all staff, including the unit teacher, was assumed as natural and expected. The participation of unit students was similarly taken as natural— participation was not an issue as it was assumed that all house students would participate. Teachers from the learning support area began negotiating with the teacher aides of the unit to prepare for some activities, and these teachers' expectation of the unit students were being clearly articulated and asserted. When confronted with resistance by one teacher aide a teacher quite bluntly responded that he was 'tired of hearing about what the unit student could not do before they have even been given the chance to try' (*fieldnotes: interviews*).

### ***Expressing elements of inclusion through a shared experience***

The final three weeks of the year similarly provided an opportunity for these elements of inclusion to be experienced and reflected upon. Each Friday morning during this period, time was set aside for an extended staff briefing, facilitated by the principal and deputy principal to encourage reflection and forward thinking. Staff were asked, "What can be taken forward to inform school planning? What are the implications for school reform that is inclusive and responsive?" (*fieldnotes: participant observation*). The three week trial was in essence a shared experience in inclusion. Relationships were formed or strengthened, identities were created, and advocacy was practiced by both students and teachers, and integrated in the shared experience. The exercise of reflection, done daily by the students and collectively by the teachers at the

staff briefings as well extra staff meetings provided a transparency that moved the school from a departmental structure to a more whole entity.

By re-grouping the students according to houses rather than form classes the teachers created five new and larger classes, involving colleagues and students who otherwise would not work closely together. Several teachers expressed their support for this arrangement: “I enjoyed working with other staff, from different departments and skills, watching their teaching habits and ideals” (*fieldnotes: interview*). The relationships formed were deepened as each staff member worked side by side with colleagues on a shared endeavour. As mentioned in the previous chapter, for many teachers it was the first time they worked so closely with colleagues. These relationships also included the students, as they were able to work with many whom they had previously had little contact with. Students from the learning support area worked beside students from the Whanau form class, just as students from ‘extension’ classes worked side by side with students from other form classes and year levels. One Year 9 student even expressed the desire to spend time and work with the students of the special needs unit when they did not take part in some activities, and this was negotiated into her schedule (*fieldnotes: participant observations*).

An important result of vertically combining year and ability groups was the strengthening of identity. Staff and students did not identify themselves to form classes during this time, but to houses, and the cohesion of each house increased as a result. “It’s like it’s no longer [learning support] and Whanau, it is [the house]” one teacher commented (*fieldnotes: participant observation*). The identity built was also that of a more integrated

staff team. The extended staff briefings and group reflections contributed to that. As identity and relationships strengthened, staff and students advocated for each other, for breaking down streaming barriers, for more vertical groupings, and for wider participation. Again, the importance of shared experience also demonstrated to school leaders, teachers and students what they could achieve through working together and inclusive cultures being strengthened through that process.

#### **6.4 Inclusion, social justice and school leadership**

As noted earlier in this thesis the stated aim of Special Education 2000 was the creation of a “world class inclusive education system” (Ministry of Education, 1996a, p. 5). In 2010 the Education Review Office (ERO) was tasked with assessing progress towards that goal. In their report ERO noted that a vital ingredient was committed and ethical leadership on the part of principals and SENCOs at the schools they researched (Education Review Office, 2010). Timperley and colleagues (2007) present research supporting the crucial role played by educational leaders in building capacity for school development. School leaders make a critical difference to the culture of the school, to the quality of the learning environment and the outcomes of students (Robinson, Hohepa, & Lloyd, 2009). As such, the aspiration of a fully inclusive education system is a key challenge for educational leaders and demands creative and flexible approaches in that leadership (Ainscow & Miles, 2008; Slee, 2011).

When inclusion is linked to the idea of social justice, it becomes imperative for the school leader to make the marginalised central to their

advocacy, leadership practice and vision. When inclusion is seen as an issue of social justice, inclusive leadership is therefore also social justice leadership. The practice of the school leader centres on addressing and eliminating marginalisation not only in their schools, but in the wider community. By implication, leadership is more than traditional managerial strategies. The inclusive school leader recognises that where exclusion exists, no social justice is possible. Exclusion also involves how decisions are made and policies are enacted (Ryan, 2006). What this implies is a move away from hierarchical relationships where leadership powers are invested in an individual to a more distributive model of leadership. While many forms of distributive leadership exist, commonalities include networks of relationships, collaboration in decision making, interdependence and co-leading, and the involvement of the wider community in decisions that affect the wider community (Harris, 2009). The leadership style is inclusive of any that would be excluded through traditional forms of management.

Inclusive leadership, Ryan (2006) elaborates, moves beyond efforts to ‘improve’ schools. “Inclusive leadership in schools needs to be about deeper moral purposes like social justice because [inclusive leaders] believe they must do their part in contributing to a world that is fair for everyone” (p. 3-4). Leadership in this conceptualisation involves a critical element, a commitment to identify injustice and exclusion within their schools and to change systems so that meaningful participation can be assured. Inclusion becomes a goal to work towards, and leadership in working towards this goal involves encouraging change that involves contributions from everyone. Ryan (2006) writes, “Leadership arrangements provide one set of strategies

for working towards inclusion” (p. 7). Inclusive leadership, then, is not something done to a school community, but done with the community. Rather than rely on one single person or leader, inclusive leadership should be “a collective process of social influence” (Ryan, 2006, p. 16). Inclusive change must involve the wider community, and how leadership is exercised plays an important role in the success or depth of such change (Robinson, *et al.*, 2009).

## **6.5 The experience of leadership in the process of change**

The findings from the use of the *Index* by the principal and the staff of the subject school are presented in this section in relation to the following themes:

- Benefits of utilising a framework
- Providing direction to the process of change
- Providing a way to support the dissonance created by the change process
- Allowing for time to reflect on theory and learning
- Indirect benefits of the framework

### ***Utilizing a framework***

“For us at [school] we know that in the journey that we want to take to becoming an outstanding school inclusion is something that we need to understand, unpack and make real,” the Principal explained (*fieldnotes: interviews*). The *Index for Inclusion* provided the framework in which to do that. Its adaptability was an initial attraction. The *Index* contains four questionnaires as appendices. Each questionnaire can be adapted to suit the

individual school. It is very flexible in how it seeks voice from students, teachers, families and other interested parties. While offering surveys or questionnaires the *Index* is not presented in a prescriptive manner.

It looks at ways that you can examine the information you gather when reviewing your current practice and values and explores how you can talk about it in different ways. I've seen that here, the results of that dialogue around inclusion, not just in a type of linear progression but in the other incidental learning that come as a consequence of these dialogues around inclusion (*fieldnotes: interviews*).

The Principal found the information in the *Index* especially accessible. He appreciated the links with other ideas to inclusion, such as sustainability.

What was really exciting about the index is that it seemed to be like a korowai that can be placed across everything that we are trying to do. Sometimes some of the material I have seen about inclusion from other sources is like little band aides that are put in place, addressing a specific issue or small group of students. I think of the *Index* as something that is really alive and something that can be worn like a korowai or a cloak over the entire school (*fieldnotes: interviews*).

### ***Direction for the process of change***

Utilising a framework for change, such as the *Index for Inclusion* gave direction to the process of change. During the *Index* phase, “producing a plan”, specific aspects of practice were targeted during a staff meeting. The Principal focused on a marginalised group in the school, students with ‘high and complex needs’ and asked staff to explore what changes could be made to make the participation of those students more meaningful. The flexibility of the *Index* process allowed the Principal to pinpoint a school practice or school population and focus attention and creative collaboration towards school development (*fieldnotes: interviews*). This activity was based upon

previous work with the *Index*, allowing the school leader to build on earlier experiences. Staff had participated in ongoing dialogue around the nature of inclusion, in the self-review activities built into the *Index* framework (such as through the questionnaires and indicators) and recognised a need to coordinate school supports. By the time he asked the staff to look at these students they were prepared and even expectant.

Directing change in this context is not to be confused with controlling change (Timperley, *et al.*, 2007). Initial activities in the *Index* process involve self-review, which encourages the school community to identify areas of need and prioritise action. Participation is designed to be voluntary and to include as wide a proportion of the school community as possible. In this way the process becomes a shared experience. The *Index* framework provided the school leader a means to pace the process to suit his individual school.

### ***Supporting dissonance***

As discussed in Chapter Five, working with the *Index for Inclusion* created some dissonance in the school, and the Principal recognised the value of this in the learning process. Some staff were challenged, and when that sort of challenge happened there was discomfort when previous beliefs or values were brought into question and newer ideas may have contained some essential truth (Fullan, 2007; Timperley, *et al.*, 2007). “Those times, those uncomfortable feelings, are the seed that has been planted and after some mulling over teachers have come back and are in different places now,” related the Principal (*fieldnotes: interviews*). One specific area staff began to

feel more strongly about was the level of participation of students with ‘special needs.’

The big thing I get from staff clearly is that they now strongly feel that it is unacceptable for us not to have all students seen and involved in the assemblies, yet for a long time they haven’t been there and we didn’t even notice or we thought that was another teacher’s call. Now I personally want to know that they are there, that’s what other people are saying. They want to know that all students are participating. (*fieldnotes: interviews*).

As discussed in the previous chapter, during the change process expectations altered as school community members became more aware of the relationship between values and practices.

As the interpretations of core values change, even as the core values themselves may alter, there is a vibrant interaction within the school between each of the individual members of the community, as well as within each member. Tension is created as values evolve and as members begin to question and examine the underlying assumptions that shape the community. Even if an individual’s core values do not change there still arises the need to negotiate within the larger consensus, especially if that consensus is shifting. While each individual in the community has their own belief system, what is spoken of here are beliefs and assumptions that are shared. Caring. Valuing. All. As explored in Chapter Five, these core values are inclusive in tone. However, each individual interprets them in their own way.

The area where the consensus is expressed among community members becomes an arena of change while newer interpretations of values are explored. What also becomes contestable is how those values are

expressed: what jokes are acceptable, what words are used, even what can and cannot be discussed. These boundaries shift with the shifting consensus. The *Index* thus provided a framework in which this highly collegial staff team could explore the nature of systemic supports that have previously been put into place. The framework provided the boundaries in which to explore difficult feelings.

### ***Importance of time***

An essential component of sustainable professional learning is that learning takes place over a period of time and is reinforced through self-reflection. Once teachers used new teaching approaches and saw the positive impact on achievement, most became convinced of the value of the new learning and affirmed in their own agency in the change process (Timperley, *et al.*, 2007). The Principal recognised the importance of this in his own management and let staff “think through issues in their own time” and for him to “...resist the urge to give all the answers” (*fieldnotes: interviews*). As discussed in the previous section, an important element of the use of this time was the possibility to participate in shared experiences, where ideas and actions are exercised and explored. The school first experienced this during its annual sports day which presented a shared experience where teachers and students alike could participate in an inclusive manner. As a result staff became more aware of who participated and who did not, as well as *how* they participated. As the *Index* process took place throughout the entire school year, staff were able to reflect on their experiences and incorporate an evolving thinking into their expectations and plans.

The Principal uses his own ongoing (he considers his understanding of inclusion ‘emergent’) journey to understand inclusion as example of the need for time, experience, and personal exploration. “When we were initially looking at some of the students or pockets of students at our school I can remember thinking that one of my ideas for promoting inclusion was to have an art exhibit” (*fieldnotes: interviews*). The exhibit the Principal first envisioned was a showcase of art by the students with special needs. Several of the students had been working with a ‘mainstream’ art teacher producing pieces reflecting the culture of the school. The idea of an open night at the special needs unit featuring this art was considered, but as the Principal’s understanding deepened that idea was dropped. His initial conceptualisation of inclusion was about looking at who was excluded and exploring ways to bring them into the ‘mainstream’. Exhibiting the art of students with special needs was seen as a way to celebrate those students’ achievement. “But then I actually realised how dumb that idea was,” he confessed.

If inclusion is about individuals being valued as a member of the community then this wasn’t, this was again isolating them, highlighting and isolating them. So my idea moved towards instead of ‘them’ having an exhibition by themselves, why not make their work another part of a whole school exhibition with their work up there alongside every other student’s (*fieldnotes: interviews*).

Inclusion, for the Principal, went from a linkage to integration to an issue of rights and even a questioning of how the concept known as ‘mainstream’ is interpreted in the school.

It needs to be fundamental to what we are doing, and to do that you’ve got to win the hearts and minds of the teachers. Now you don’t do that by knocking them on the head with it, you do it by creating that awareness, creating moments for reflection to show

them that they have the power to make change, that they can do things in their practice. You combine practice and theorising, they go hand in hand, you've got to leverage both of them (*fieldnotes: interviews*).

### ***Indirect benefits***

Part of the potential of the *Index for Inclusion* has been its ability to influence other developments in the school. One of the areas of the school was to go through some rationalisation of buildings. The learning support area of the school was located in that area and would be relocated within the school by the beginning of the next academic year. The HOD utilised this move, and the dialogue encouraged by the *Index* process, to open dialogue with the Principal about possible changes to the service model.

The HOD was speaking to me and saying something like, 'Actually, things could be, different, couldn't they? We could be looking at having students moving in and out of learning support, about the department being a school wide resource'. We started speaking about all learners in the school, not just those we have traditionally put into a supported area (*fieldnotes: interviews*).

Comfortable with a leadership style that promotes teacher learning (Ryan, 2005, 2006; Timperley, *et al.*, 2007), the Principal encouraged staff to look at ways to improve all school systems and explore how to meet the needs of students not just labelled 'special needs' but any student with additional needs in literacy, numeracy, English as a Second Language, and Gifted and Talented. "I've seen the potential and the possibility," the Principal observed, "to put some key players at the table together, which is something we would never have been able to do easily before utilising the *Index*" (*fieldnotes: interviews*).

### ***Potential inhibitors to inclusion***

The Principal identified three primary areas that could act as inhibitors to the development of inclusion in schools: limiting the scope of inclusion; the departmental structure; and accountability driven policies.

Limiting the scope of inclusion to a particular group of students can inhibit the development of inclusion by reducing inclusion to a type of ‘add on’ to existing practice (McMaster, 2013b). One example of this can be seen in the Inclusion Practices Tool (IPT) (NZCER, 2013) produced by the New Zealand Council for Educational Research under contract from the Ministry of Education. Although designed to be an online audit/questionnaire in which schools can measure their ‘inclusive practices’, the IPT resembles corporate efficiency practice more than it does sustainable school improvement or professional development (McMaster, 2013c). To create this ‘self-review’ tool, indicators from the *Index for Inclusion* were ‘borrowed’ and adapted to a Likert scale. The *Index for Inclusion* is not primarily an evaluation tool; the decision was taken by the developers of the *Index* to avoid the use of quantitative devices (T. Booth, personal communication, February 13, 2013).

In the high school setting, the traditional organisation of the school around departments, or ‘curriculum boxes’, has led to situations where they, “have become so isolated that the part has lost sense of the whole” (*fieldnotes: interviews*). The Principal contended that the curriculum areas have dominated, often in competition with each other, to the neglect of the larger issue of the purpose of education. To break this division down the principal and his leadership team initiated dialogue around putting a context to each

curriculum area as a component to the whole to make the programmes offered by the school more relevant and inclusive to all learners (Bolstad & Gilbert, 2008). Heads of Department were encouraged to engage in collaborative planning that brings more significance to each student's journey through school. This was made more possible by widening the scope of inclusion from one focussing on a particular group of students to an issue that involved the entire school and how to create a learning environment that caters for all learners.

As expressed in his own learning journey, exploring the nature of inclusion led full circle back to his own practice and vision of the type of school he wanted to help create. The danger, to the Principal, with limiting the scope of inclusion is that it may be done for shallow reasons, "just for the purpose of having it signed off". This danger is increased when a system becomes driven by accountability (Fullan, 2005).

The message I keep getting from Ministry initiatives is that inclusion is almost like a check list. "Have you done this?" "Have you done that?" If we're put under pressure like that we are going to operate in an unethical way ... we're just going to do what we need to do to fill in the tick boxes. We won't do what is really needed to be truly inclusive with that as a driver. If schools see it as some sort of performance measure, then teachers will see it as just that extra thing the teacher has to do, as opposed to a fundamental way of acting, that inclusion is our way (*fieldnotes: interviews*).

When capacity building is the driver for change, the Principal stressed, then that change will become sustainable. What is meant by capacity building is as described by Bishop, O'Sullivan and Berryman (2010): the ability of school leaders to provide professional learning opportunities for teachers to learn from their experience and apply that learning to their practice in a

continuing and reflective manner. Building the capacity of the school community around the development of inclusion would enable the Ministry to reach the desired outcome of a ‘world class inclusive education system’.

## **6.6 Chapter discussion**

Through his experience of utilising the *Index for Inclusion* as a framework for change, the Principal highlighted both direct and unintended benefits. A framework has provided direction for the change process that was easily accessible, providing a safe space to deal with the dissonance created as well as utilising the time needed for school staff, including school leadership, to explore the theoretical implications of inclusion and how those theoretical implications impact practice. Unintended or unanticipated benefits came as a result of inclusion being the focus for the entire school, and the *Index for Inclusion* being a point of reference. This was reflected in a changing consensus among staff as to how core school values were interpreted and reflected in practice.

On a systemic level, the school restructured how services were delivered for students with special educational needs. There was a growing consensus about the participation of all students in whole school events. Staff became increasingly aware of who participated and who did not, reflecting on the nature of that participation. Non-participation by a staff member or a group of students, which was previously considered a norm, was increasingly seen as unacceptable. Resource allocation and organisation similarly came under discussion as school staff began to reflect on their current model. An increased notion of who ‘all’ was meant that separate departments, such as

the learning support area and the special needs unit, needed to improve coordination and resource use. By the end of the year the students from the unit were incorporated into the learning support area and the HOD for learning support was using the *Index for Inclusion* to inform her plans to incorporate her department more fully into the life of the school. The previous segregation of unit students, which may have been done with good intentions, was seen increasingly as unacceptable.

While noting potential inhibitors to developing inclusive schools, the Principal saw an opportunity for the Ministry of Education to achieve the stated goal of a ‘world class inclusive education system.’ His experience of leading towards this through the use of a framework demonstrated how school leaders can develop the capacity to build world class inclusive schools. The Ministry has an important role to play, the Principal argued, in facilitating this.

They have a lot of people that are extremely passionate about special education and who can bring in a lot of different skills at a lot of different levels, but to make the systemic change around inclusion so that schools are truly inclusive the drive in this area must be to build capacity (*fieldnotes: interviews*).

Part of this should be a move away from measuring performance to sharing experiences across the sector. These experiences, or stories, of how individual schools have developed capacity around inclusion, the tools they have used, adapted or created for the context of their own school, should be celebrated and shared. This thesis represents one such story.

In the school this has even resulted in a discussion of what is meant by the term 'mainstream'. The 'norm' is often unexamined and unquestioned (Bauman, 2011; Graham & Slee, 2008; Slee, 2011). By focussing on a minoritised or marginalised group the assumed 'mainstream' or 'normal' is not examined. However, as the nature of the school becomes more transparent, that space considered the 'norm' is increasingly examined and there are fewer shadows in which exclusionary practice can exist. The conceptual map of the school enabled the Principal to focus on those shadows. As discussed in the previous chapters, practices previously ignored were increasingly questioned, and staff created meaningful ways to include previously marginalised students in the wider life of the school, just as staff were also recreating their concept of what they previously called 'the mainstream'. The transparency encouraged in the process of developing a more inclusive school culture enabled the elements of inclusion to be exercised, thereby strengthening the inclusive process.

As the experiences of the subject school have indicated, shared experiences can provide opportunities to involve community members in developing relationships, empowering each participant, create identity as an inclusive class or school, and visibly involve all members of the learning community. Whereas the three week experience at the subject school involved a great deal of planning and effort, any thoughtful shared experience can draw all the elements of inclusion together. This research has illustrated how, through the process of co-creation, and the support of school leaders, community members bring out the core elements of inclusion and as a result build and strengthen the culture of inclusion within their school.

# Chapter 7: Discussion and conclusions

## 7.1 Introduction

Inclusion has been a stated aspiration since the introduction of Special Education 2000 in 1996. However, as ‘aspiration’ it remains a fragile concept. This thesis has argued that inclusion is more than an aspiration or a desire; it is a concept that is based on social justice and its expression is a reflection of the culture in which it is demonstrated. Building an inclusive educational system, and an inclusive society is, as Allan (2005) notes, an ethical project. Inclusion has been portrayed in this thesis as a process of cultural review and social construction. I wanted to know how inclusion is experienced in our schools, and how inclusive cultures were developed. The research looked into the culture of one school and the society in which it is situated. Inclusion, this thesis argued, is utopian in so far as it is a vision of a better future grounded in an understanding of the present. As the researcher I played an active role bringing that vision closer to reality, working with the staff and leadership of one school to examine and reflect on their culture and the values that guide their practice.

Inclusion has proven hard to define, and as Slee and Allen (2001) have pointed out, there is an inherent danger in that. However, this lack of clarity or common model of what inclusion is or what inclusion looks like can also be seen as a strength. By the open nature of the term we can continue to explore its deeper meanings, deconstructing our older ways of thinking. In

this sense the term inclusion is more like a spectrum than a measurable goal. We have already moved largely away from concepts such as ‘normalisation’ or ‘integration’—to simply be in is not enough—to a wider interpretation which includes anyone in our schools or communities who face barriers to their full and meaningful participation.

There once was a time in our not too distant past that separate and isolated residential institutions were seen as an acceptable way to educate members of our community with physical or intellectual impairments. This is no longer the case as our societal values and ideas of social justice have ‘moved along the spectrum’. This is a critical element that acts as a wedge which gradually widens our perceptions and alters our old way of thinking. By not having one overarching and concise definition we collaboratively work it out, and the values behind inclusion become more shared.

The findings chapters have addressed the questions that guided my focus and interpretation of data throughout the project. The aim was to understand how the concept of a world class inclusive educational system was understood, enacted and negotiated within the parameters set by SE2000. I investigated the contexts within which our system of education is situated. The research looked at the experience of this school community developing inclusive values and practices. Subsidiary questions considered the process of reflection and change understood by school staff and leadership; the limits of inclusive values and practice and what may inhibit or enable inclusive development.

Inclusion has been called a process; in a very important way it is a process of understanding. This understanding is ongoing; it requires time,

perseverance, and even discomfort through negotiating the tension between practice (including the provision of services) and values. During the research year staff were able to adjust their practice to align more with their espoused values. Through doing so they provided an example to other schools in Aotearoa New Zealand. The understanding and enactment of inclusion within the school reflected a hermeneutic circle, a threefold process described by Ricoeur, and similarly utilised in my analysis of data, as mimesis. Utilising the *Index for Inclusion* as a tool for self-review and change, the staff used their pre-understanding (or pre-figuration) of their school culture to understand more clearly the reflection of values into practice. Staff then organised this understanding into a picture of a whole (configuration, as represented in Chapter Four in the form of conceptual maps). Finally, staff reconfigured the expression of their school culture, based on a deeper understanding of how they could begin to align practice with values. Through self-understanding the staff began to re-write their ‘text’, the narrative expressed, as Ricoeur (1981) writes, to “give itself an image of itself, to represent and realise itself” (p. 225).

How this was done is the subject of my findings chapters, which will be summarised in this chapter in relation to conclusions arrived at in my research. Also discussed will be the role of the researcher as ‘organic intellectual’ throughout this research. The position taken as researcher was based on a clear and ethical sense of responsibility. This thesis is based on the assumption that researchers must be clear about the intentions and effects of their research. I will also reflect on the use of the *Index of Inclusion* and suggest ways in which it can be used in Aotearoa New Zealand schools as an

effective tool in building a ‘world class’ inclusive education system. Finally, this chapter will conclude by considering limitations to the development of inclusion in Aotearoa New Zealand. I argue that through celebrating our cultural strengths we can challenge neoliberal hegemony. Through doing so we can not only imagine alternative, democratic and socially just forms of education, but build and strengthen what is socially just in our society and culture.

## **7.2 Summary of findings**

A number of conclusions arrived at to make sense of the experience of the school staff and leadership were as follows:

- Inclusive change involves a renegotiation of meaning. This renegotiation takes time, perseverance, and at times involves pain. It is a dynamic process at the cultural level, taking place in the tension between world views, between policy and practice, between ideals of an education that is ‘special’ and an education that is inclusive. This tension is an opportunity for change.
- Inclusion is linked to culture; it is a reflection of time and place. Inclusion can be developed within a school culture through reflecting on core values and through aligning those values with practice and artefact.
- The understanding of inclusion deepens and develops through reflection and action in an ongoing and experiential process of learning.

- The utilisation of a framework for inclusive change can direct and support the development of inclusion in Aotearoa New Zealand schools.
- In a devolved education system such as in Aotearoa New Zealand individual expressions of school culture and school leadership become strong influencing factors in the development of inclusion.

Chapter Four outlines the *Index* process in the subject school. As facilitator and ‘critical friend’ I helped the school Principal establish a team of staff interested in furthering inclusion within the school. This core of eight teachers met regularly to explore the *Index* process. Wider discussions were brought to the whole staff team, such as through using the questionnaires provided in the *Index*, reviewing current practice and identifying areas for improvement. In this manner, the nature of inclusion and the expression of values on which the school prided itself were explored critically.

For example, the school had an ethos of ‘a place for every learner’. What the *Index* process enabled the staff to consider was what type of place they offered. As the school operated a special needs unit staff directed their attention to that part of the school. What they saw in practice did not agree with how they were now interpreting school values. When the unit was established the separation of students with high needs was seen as a way to offer a safe and protective learning environment. Over time the wider consensus changed to view that practice as segregation and exclusion.

Conceptual maps of the school (presented in Chapter Four) offered a look into how those core values were expressed through artefact and practice.

Staff and school leadership were able to reflect on any misalignment of value and practice. The theoretical construct, or model, of culture described in Chapter Two provided a means to situate the change process within the subject school. The existence of a separate learning unit for students with ‘special needs’ and common assumptions regarding the participation of students and staff from that part of the school were brought into question. This questioning took place at a deep level, within individual staff members. It also took place collectively as staff explored the meaning of inclusion.

Chapter Five contained many examples of how values and expectations altered as underlying assumptions were examined. Given the time to explore and reflect on school values and practices also meant reflecting on just how concepts such as ‘mainstream’ were understood. A term that was used without thought at the beginning of the year became one that was contentious. The concept of inclusion began to increasingly apply to other populations within the school, such as Pacifica students, students with reading and literacy needs, and the place of departments such as Māori and Learning Support. A focus for school development became creating a learning environment that was relevant and inclusive for all.

This process of negotiation and re-negotiation allowed for the development of a shared vision and a common definition of inclusion. It provided a process of learning through reflection and experience that enabled sustainable change. That change took part on the level of school culture. The process at times created dissonance, but the framework provided by the *Index for Inclusion* provided a way to support this dissonance so that learning could be ongoing and experiential. Chapter One discussed essential aspects of

inclusion, which included a shared vision; committed leadership; collaboration; the identification and removal of barriers to meaningful participation; and inclusion as an issue of social justice. Through the experience of developing a more inclusive culture in their school a deeper understanding of inclusion emerged.

Through this learning journey several core ‘elements’ of inclusion were identified. These ‘elements’ were discussed in Chapter Six and included relationships; shared experiences; advocacy; identity; and transparency. These elements can be both litmus test and guide to strengthening inclusion as a value and in practice. Each of these elements are linked, in that they enable and strengthen each other. Relationships, for example, are developed through shared experiences. Advocacy can help develop identity; it can foster relationships and enable experience. Transparency can encourage continual reflection and self-improvement. In an inclusive learning environment there can be no ‘blind spots’, no group of ‘others’ that are detached from the community, unseen and unknown.

Leadership committed to inclusion and social justice is an essential aspect of sustainable inclusive change (Education Review Office, 2010; Timperley, *et al.*, 2007). Leadership can enable or it can inhibit inclusive development. The hierarchical nature of school leadership places a great deal of responsibility and influence in the person of the school leader. The past experience of the subject school demonstrates the effect of management styles misaligning with school culture. As discussed in Chapter Four, previous ‘top down’ leadership approaches resulted in staff disaffection, and even conflict within senior management. Chapter Six contained the example of school

leadership guided by ideals of social justice and a desire to develop inclusion within the school. In this way a potential inhibitor (the hierarchical structure of school management) acted as an enabler in that the school leader, through an inclusive style of management, was able to advocate for school reform and involve staff in the process of school development.

The Principal of the subject school considered his understanding of inclusion to be a journey. My role as ‘critical friend’ during the research year allowed for a relationship to develop between us where I could also act as mentor and advisor. While both of our understanding of inclusion deepened, he was able to use my ongoing analysis to look critically at school practice. Utilising a framework such as the *Index* provided direction for the change process, and presented a rationale for the school leader to work with staff and bring them into the change process, thus broadening the ownership of that process. The framework additionally provided a means to support dissonance through providing boundaries in which to explore that dissonance.

The experience recounted from Portugal and the United Kingdom in Chapter One (S. Freire, 2009; S. Freire & César, 2003; Paliokosta & Blandford, 2010) were examples of dissonance leading to the reinforcement of older values and beliefs. The dissonance created through questioning older values and beliefs takes persistence and can often be a painful process as those older interpretations are challenged. Persisting with the process helped the culture of the subject school to develop. For a school leader committed to inclusive change the use of a framework such as the *Index for Inclusion* provides time for reflection, for uncomfortable feelings, thoughts, doubts, observation and experiences to be processed. Chapter Six contains examples

of this processing, and of school leadership promoting teacher learning and ownership through inclusive leadership.

### **7.3 Role of the researcher**

The role assumed as researcher in this project was that akin to a Gramscian ‘organic intellectual’ or Freireian educator. My role as researcher, in a very particular context, has been as an academic as well as an activist. This does not compromise research; it gives research relevance.

There were constraints on my actions. These constraints were ‘respectful’ as well as ‘pragmatic’. Ultimately, I was a guest in my subject school. One participant asked during the year if I felt like an outsider. As a guest I could be asked to leave. ‘Respectfulness’ had implications on my methods as a researcher. Where I provoked through action (e.g., ignoring a teacher or teacher aide’s wishes and facilitating participation) or through a comment that may have sewn dissonance, I had to remain conscious of my own motivations and weigh the possible repercussions of my actions. This balancing requires continued reflection and awareness of limitations regarding power.

In my field notes I tried to process what I saw, what was done and what was left undone. At times I found myself standing by while students of the special needs unit were spoken to or treated in ways that I considered objectionable. There is a fine line where what is considered appropriate behaviour in ‘the field’ becomes simply an excuse for inaction. Should I have stood my ground on those occasions and defended those students? Should I have silenced the teacher aide and her negative comments? Should I have ...

but questions like that come after the time to act. In the 1980s Steven Taylor (1987) found himself in a much worse situation. He was studying the ‘care givers’ who worked in what was referred to in that time as an institution for the mentally retarded. He saw criminal abuse, violent attacks, sexual assaults. He asked the question, should I have ...? But Taylor absolves himself, at least in an academic paper, by taking the position that had he acted he would have lost his research site, his participants’ acceptance of him, and in what to me sounds like guilty denial, he even recalled his ethical responsibility to uphold the confidentiality of his participants. The whistle was finally blown at that ‘institution’ but not by him. He stayed and continued to watch and develop his ‘grounded theory’ of institutional abuse.

A critical ethnographer must balance respectfulness and pragmatics ethically. I helped effect change at the subject school through using my past experience, knowledge gained through the analysis of my data and the passing of that information onto others, and also empowering others to affect change in their own community. I endeavoured to use my position as researcher, activist and advisor to work with the school community to develop an inclusive culture. This is the responsibility of the critical ethnographer, but also the responsibility of the researcher.

## **7.4 Reflections and recommendations on the Index for Inclusion**

The *Index for Inclusion* provided a framework for inclusive development. It was in many ways, as Carrington, Bourke and Dharan (2012) write, a ‘Trojan Horse’ for change. Once in the school the *Index* was also a *rationale* for

change. The framework provided not only the reason to undertake change, but provided a support for all aspects of the process, as were identified by the Principal of the subject school. As explored in my findings chapters, the framework provided direction to the process of change. It provided a way to support the dissonance created by the change process. It allowed for the time that was essential for reflection on theory and learning. These features align the *Index* process with best practice as identified in *Teacher Professional Learning and Development: Best Evidence Synthesis Iteration* (Timperley, *et al.*, 2007).

The framework for inclusive development employed by schools in Aotearoa New Zealand does not have to be the *Index for Inclusion*. As long as a framework is utilised that incorporates the elements identified above, then sustainable change can potentially be achieved. After reviewing all other similar frameworks being employed by educational institutions throughout the world (McMaster, 2013a), however, I believe that the *Index* offers greatest potential for Aotearoa New Zealand.

Lessons learned through the yearlong use of the *Index* include the effectiveness of the role of facilitator or ‘critical friend’ from outside the school community, the importance of formal planning, and the need to include students and other community members. In the role of ‘critical friend’ I was able to challenge assumptions and question practices that may have been difficult had they been raised by a staff member. A ‘critical friend’ can question more freely, allowing for collegial relationships to remain intact. In Chapter Four levels of planning were discussed. This planning was informal as well as well as systemic. However, this planning did not utilise the planning

framework provided by the *Index*, nor did it involve school planning frameworks. Planning thus lacked an authority and an urgency that could have been achieved through a written record. Advice to schools wishing to develop inclusion through a framework would include the importance of committing their plans to paper, whether through the planning framework provided, a school action plan or a school charter. Finally, an acknowledged limitation of this research was the lack of formal participation by students or the wider school community in the change process. The subject school is committed to developing this following the research year. To maximise the potential of a whole school framework such as the *Index for Inclusion*, the widest possible participation should be sought.

Ultimately, it is the flexibility of the *Index* framework that presents schools in Aotearoa New Zealand with a real potential to become ‘world class’. This flexibility has been demonstrated in Tanzania, on a large scale in an entire Local Education Authority (LEA) in England, and is currently being adapted to the island nations of Vanuatu, Fiji, Solomon Islands, and Samoa. Each of these examples will be discussed briefly as they highlight the potentiality of the *Index*, or *Index*-like frameworks use in Aotearoa New Zealand schools.

Through involving school staff in an action research project, Polat (2011) sought to explore and develop a means to facilitate whole school planning for inclusion that reflected the cultural and economic realities of a country in the southern hemisphere. The project was inspired by the *Index for Inclusion*, though rather than adapt or translate the *Index*, the researchers worked as facilitators and ‘critical friends’ to, “develop ways in which

participating schools could include all learners in their community and improve their quality of education, thereby impacting learner outcomes” (p. 54) in the specific context of a developing country. The decision to create their own index was prompted by barriers to full participation which schools in the northern hemisphere have trouble imagining, such as infrastructure and resource limitations; large class sizes (80 plus); lack of qualified staff; limited pit latrines; teenage pregnancies; diseases (HIV/AIDS, cholera, and malaria); and long distances to travel to school. The process used in the project reflected that of the *Index for Inclusion*, e.g. review of current situation—identify barriers and identify needs—plan for action and initiate plan—followed by a review of outcomes, reassessment of situation, and further planning and acting. School coordinating teams in Tanzania placed infrastructure needs highest on the list of priorities. The research project is still ongoing and how far inclusive school policies, cultures and practices will change remains to be seen.

The *Index for Inclusion* is currently being implemented in the English county of Norfolk (Carter, 2012). After an initial pilot project involving 35 schools the Local Education Authority (LEA) has decided to implement the *Index* to all 450 schools in the authority over a two year period. Eighteen schools will host an ‘Index Forum’ every six to eight weeks inviting the 25 to 30 schools in their locale. These forums will be used to explore the tool, monitor engagement with the project and explore emerging themes:

This project offers schools in Norfolk access to a forum of professional reflection and focused discussion about self-directed school improvement, using the shared language of the revised index for inclusion. In so doing, it is an aspiration that the culture of dialogue and collaborative peer evaluation around school

improvement issues, will be nurtured promoting longer term sustainability of this approach (p. 10).

Additional forums will pilot the Early Years version of the *Index* across 30 early childhood education settings and pilot the application of the *Index* in a Further Education context. *Index* co-author Tony Booth will act as special advisor to the project. The Norfolk LEA has set aside £230,000 for the research project, which translates to less than £500 per participating school, a minimal amount that will help ensure that schools' efforts do not become dependent on funding. Intended outcomes of the project include sustainable professional development, meaningful participation of staff, students, families and Governors (Board of Trustees) based on shared vision, and a culture of action research within Norfolk schools and settings “where practitioners have an opportunity to participate in ‘action research’ as they pursue their own improvement tasks” (p. 10).

Closer to home the *Index* framework is being adapted and used in several Pacific nations. Queensland University of Technology (QUT), in conjunction with Australian Aid, is helping to introduce the *Index for Inclusion* to Vanuatu, Fiji, Solomon Islands, and Samoa to help build capacity with an emphasis on education for students with disability and inclusion. Researchers from QUT work with a national researcher in each country in how to not only introduce the *Index*, but how to adapt the framework to their unique cultures. The *Index* is viewed as a tool to be used as needed, changed and adapted to address the existing needs identified by each community (J. Duke, personal communication, July 11, 2014).

Whole school re-culturing programmes such as the *Index for Inclusion* offer a framework through which school communities can move towards aspirations of inclusion. The strengths of school wide programmes are their collaborative nature, and the praxis of reflection, planning, acting, and reviewing outcomes to begin another cycle of exploring the nature, definition and practice of inclusion. During the *Index* process school staff underwent a process of learning that involved reflecting on deeply held beliefs. As is well known, Dewey concluded that people learn not by doing per se but by thinking about their doing. The framework employed allowed sufficient time for this exploration and reflection to take place. Schools utilizing the *Index* can create a shared vision and a shared definition in creating their own expression of inclusion.

The flexibility of the educational system in Aotearoa New Zealand, including SE2000, can permit the wide usage of such frameworks and give each school the scope to adapt the *Index* framework to suit their particular school culture. The Resource Teacher: Learning and Behaviour (RTL) service, as well as Special Education Advisors (SEA) from Ministry of Education: Special Education are well placed to act as facilitators and ‘critical friends’ for the schools in which they already work. Using an action research model, the use of the *Index* in Aotearoa New Zealand schools could similarly offer an up to date review of SE2000 conducted by those who work within that system. This work would help form or strengthen what Wylie (2012) refers to as ‘vital connections’ within our education system. Through sharing the stories and experiences of schools exploring the concept of inclusion we

would similarly improve our collective understanding of inclusion and social justice and our awareness of how those values are reflected in our society.

All that is required is a clear and unequivocal commitment on the part of the Ministry of Education to develop inclusion in our schools in a sustainable and collaborative manner.

### **7.5 Final thoughts: working the ‘shady places’**

The lessons learned during this year showed the *Index for Inclusion* to be a useful tool for developing inclusion. More than that, however, the time set aside for the process of reflection and exploration of core values regarding inclusion helped make any change more resilient. The framework and the process helped the school move from being a ‘good’ school towards being an ‘outstanding’ school.

Behind school systems established to serve the needs of students with ‘special needs’ lies a model of ‘special education’. The school is part of a national education system, including a model for the provision of services for students who have been labelled and identified as having ‘special educational needs’. “Policy is not neutral,” write Thomas and Loxley (2007).

The social categorization of children and young adults as somehow being ‘special’ is constructed in and legitimized through the kind of policies that ‘speak’ about them ... It is very much a signifier for underlying social relations of power (p. 94).

The supports built up around the subject school’s most vulnerable population were done, as the Principal admits, with the best intentions. They were also done within the structures of SE2000 which created the framework for the allocation of resources and the provision of special education services in

Aotearoa New Zealand. The Ongoing Resource Scheme (ORS) classifies children according to the severity of their needs and places a financial value on them. Students verified 'high' needs are allocated funding for 0.1 specialist teacher time as well as a per capita financial sum. Students verified 'very high' receive funding for 0.2 specialist teacher time and a higher per capita sum.

This funding is used by schools to finance special education provision, including units, unit teachers, and the teacher aides working in those units. Whereas SE2000 ostensibly sought to create an equitable provision of services (Ministry of Education, 1996a), it did not break from the 'politics of identity' (G. Thomas & Loxley, 2007). The identity given to the students of the unit in order for funds to be acquired to enable their presence in school also sets them apart from their peers and the majority of teachers at the school. The complexity of the system of funding and resource allocation additionally creates an aura of mystery around that part of the educational system, a complexity that tends to be accessed only by the initiated few. Working in this system gave a great deal of power, for example, to the unit teacher in my subject school in the running of that unit and in the degree of separation between her and her colleagues. This separation also kept the students of the unit restricted to a small part of the school and greatly limited the familiarity (and confidence level of working with students with diverse needs) of most members of staff.

Staff and school leaders at the subject school were able to alter how services were delivered within their school. This is a recognition of the flexibility of the New Zealand education system to fit the individual culture

of each school. SE2000 may categorise a student ‘high needs’ or ‘very high needs’, it may assign a monetary value on that student, but *how* a school welcomes that individual and creates a culture in which all students can play a meaningful role is largely in the hands of that school. In this sense, each school can be a ‘shady place’ in building a world class inclusive educational system, and a more inclusive society. Each school still faces, however, impediments to that ‘utopian’ aspiration or vision.

As discussed in Chapter One, the definition of inclusion offered by ERO has subsequently framed and limited meaningful discussion of inclusion in Aotearoa New Zealand schools. The goal of *Success for All*, that all New Zealand Schools will demonstrate ‘mostly inclusive practices’, requires that inclusion be reduced to something quantifiable. ERO has not only limited both the definition and discourse of inclusion in both the 2010 report that helped inform *Success for All*, but also in subsequent reports on inclusion in Aotearoa New Zealand. These limitations are embedded in the *Success for All* initiative and influence Ministry of Education efforts to attain their measured goal, and as such threaten the attainment of original aspirations regarding inclusion.

The Inclusive Practices Tool (IPT), for example, is part of the Ministry of Education’s strategy for achieving ‘a fully inclusive education system’ (Ministry of Education, 2012). The Minister of Education has now, as part of the initiative *Success for All: Every School, Every Child* (Ministry of Education, 2012b) set the target of 100% ‘inclusive’ schools in New Zealand. As a result schools will receive access to the IPT, designed to be an online resource where they will be able to input data about their practices.

The IPT has been designed to assist schools in their annual self-review cycle. Data generated through questionnaires will generate reports that will feed into planning. For busy administrators, the IPT may provide a mechanism that makes review and planning easier. However, while the IPT may purport to offer a short cut to developing inclusive schools, it is not through short cuts that sustainable inclusive change is achieved (McMaster, 2013c). Nor can inclusion in any meaningful sense be achieved through managerial and neoliberal reforms.

In attempting to ‘audit’ or ‘measure’ culture, mechanisms such as the IPT have been produced that quantify inclusive ‘practices’. These devices, whilst possibly expedient in the eyes of management, serve more to limit the definition of inclusion. Inclusion, in the scope of an audit, is reduced in such a way that it becomes not just measurable, but manageable. The practice of inclusion is distanced from concept, and in so doing the effort loses a key ingredient of sustainable change. School wide programmes such as the *Index* view inclusion not as a practice, but as a value laden concept, echoing the sentiments espoused in the Salamanca Statement, the Convention on the Rights of Persons with Disabilities, and the New Zealand Disability Strategy. The success and sustainability of current programmes lies in this open exploration of values—open in the sense that it involves all community members and is not averse to challenging existing values, beliefs or assumption.

By narrowly limiting the definition of inclusion the discourse of inclusion is also limited (McMaster, 2014b). Inclusion has the potential to be a very powerful concept, one that draws into consideration the way we

organise our schools, our economies and our societies. This implies change, and change can be threatening, uncomfortable, challenging. Change, however, can also be liberating, which adds a sense of disappointment to Ministry of Education and ERO efforts to limit the discourse around inclusion. The Ministry has never focused on *how* to create a world class inclusive educational system. Their focus instead has been on resourcing special education provision in the ‘regular’ and ‘special’ educational setting, and then measuring school performance on implementing special education provisions.

While the effects of neoliberal reforms continue to manifest in societies and educational systems, certain cultures appear to have better insulation to protect themselves against the extremes of the ideology. One well known example of this is Finland, where intuitive cultural resisters, such as values of social justice, have strongly deflected extremes of neoliberal reforms that have severely impacted other nation’s educational systems. In terms of education, Finland has consistently demonstrated high standards (even on OECD measurements like PISA). In contrast to neoliberal educational models, in Finland there are no private schools, educational administrators are required to have been teachers, there is no standardised testing except a matriculation exam at the end of school, there is trust in teachers to choose their own methods and materials; and teaching is a respected profession. Pasi Sahlberg of the Finnish Ministry of Education and Culture notes that cooperation is a crucial starting point for growth (Barseghian, 2012). The extent to which such values can be built into existing systems is indicative of the strength of the culture. Whereas, for example,

practitioners in Finland may perceive that the educational policies there may be unsupportive of inclusive education, those policies do not impose significant barriers to inclusive innovation where it may occur (Tarr, Tsokova, & Takkunen, 2011). Finnish values, such as those that emphasise cooperation over competition, have enabled the Finns to build a world class education system that refuses to reduce education to a market (Sahlberg, 2011).

Similarly, there appears to be aspects of New Zealand culture that offer resistance to neoliberal hegemony, that blunt extremes and challenge an orthodoxy that insists on the primacy of the market as the ultimate arbiter in human relations. It may lie in a sense of ‘fair go’ or a strong belief in equity, or perhaps in what historian James Belich refers to as a “colonial populism” that abhors “small and shadowy conspiracies”, an egalitarianism and dislike of overt class distinctions (1996, p. 332). A small population keeps politics at a face to face level. Local campaigners can still influence the decision making process. Local schools have the room to manoeuvre, to explore values and create cultures that encourage the value of caring over selfish competition. It may equally lie in a respect for whanau and community, the ‘cultural potentialities’, to borrow Royal’s term (2012), inherent in Māoridom. Tangata Whenua possess strength in epistemology and educational activism, as the kura movement so clearly demonstrates. The biculturalism of Aotearoa, respected and mandated by Te Tiriti, provides a ready avenue for collaboration, partnership, and alliance.

Rather than focus solely on the negative impacts of neoliberal reform on New Zealand education—a valuable and critical tool for our

understanding—research should also focus on those aspects of New Zealand culture, Māori and Pakeha, that blunt the excesses of neoliberalism that can be seen in places such as the United States and England. These cultural areas can provide the ‘shady places’ in which to combat neoliberal hegemony. Furthermore, researchers should actively work with their communities in challenging that hegemony and in creating a future that more accurately reflects their values.

Gramsci contended that history presented possibilities. His advice was to seek out those ‘shady places’ in which education in capitalist society can be challenged. Turning our gaze to those inbuilt inhibitors, those values and features in Aotearoa New Zealand culture, can highlight sites of resistance as well as sites for celebration, where agency is exercised. Booth (2011) reminds us that

[v]alues are fundamental guides and prompts to action. They spur us forward, give us a sense of direction and define a destiny. We cannot know that we are doing, or have done, the right thing without understanding the relationship between our actions and our values. For all actions affecting others are underpinned by values. Every such action becomes a moral argument whether or not we are aware of it. It is a way of saying “this is the right thing to do” (p. 33).

Creating cultural values should be a reflective and collective venture, not one hijacked by ideologues. The ‘shady places’, the sites of resistance, offer a fruitful place to start.

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# Appendices

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## Appendix 1: Ethical clearance



### HUMAN ETHICS COMMITTEE

Secretary, Lynda Griffioen  
Email: human-ethics@canterbury.ac.nz

Ref: 2012/32/ERHEC

31 August 2012

Christopher McMaster  
School of Educational Studies & Human Development  
UNIVERSITY OF CANTERBURY

Dear Christopher

Thank you for providing the revised documents in support of your application to the Educational Research Human Ethics Committee. I am very pleased to inform you that your research proposal "Finding a "shady place": a critical ethnography of developing inclusive culture in an Aotearoa/New Zealand school" has been granted ethical approval.

Please note that should circumstances relevant to this current application change you are required to reapply for ethical approval.

If you have any questions regarding this approval, please let me know.

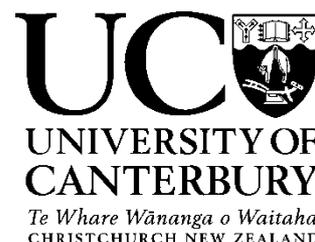
We wish you well for your research.

Yours sincerely

Nicola Surtees  
**Chair**  
***Educational Research Human Ethics Committee***

*"Please note that Ethical Approval and/or Clearance relates only to the ethical elements of the relationship between the researcher, research participants and other stakeholders. The granting of approval or clearance by the Ethical Clearance Committee should not be interpreted as comment on the methodology, legality, value or any other matters relating to this research."*

## Appendix 2: Lay summary of research project



### Finding a Shady Place: A Critical Ethnography of Developing Inclusive Culture in an Aotearoa/New Zealand School

#### Information sheet

To \_\_\_\_\_ school staff, students, and families,

My name is Chris McMaster and I am working towards a doctorate in education at the University of Canterbury. The focus of my study is the building of inclusive practices and values in a whole school setting. As part of this, the school will be following a process known as the *Index for Inclusion*. The *Index for Inclusion* is a tool developed in the United Kingdom and used in numerous countries around the world. It is a process in which the whole school community—students, parents/caregivers, staff—look at what they do well and what can be improved. The *Index for Inclusion* provides a framework within which to plan and build a better school. This involves creating a plan that is individually tailored for the school; it will be created by and implemented by the school community.

My role will be that of researcher, but I will also be a facilitator in this endeavour. The methodology behind my research is known as *critical ethnography*. This means I get to spend a good deal of time within the school (an entire school year), but it also means I get to come into the school with an aim. My aim is to help develop inclusive values and practices within a school community. Inclusion, in the words of the developers of the Index for Inclusion, “is about increasing participation for all children and adults. It is about supporting schools to become more responsive to the diversity of children’s backgrounds, interests, experience, knowledge and skills.”

The *Index for Inclusion* has been used in only a handful of schools in New Zealand, and there has been no detailed study of its effectiveness. This will be the first. As well as helping the school implement the *Index for Inclusion*, I will also be looking at what makes it work well in the school environment, and what

might be holding inclusive values back. I am very interested in the views and values of the school community, and how these may change during the year. All participation in this project is voluntary. There will be times when I will invite members of the school community to talk about their experiences. In these instances I may ask if you would like to participate in an interview (lasting from 45 minutes to one hour) or a more informal chat about your perception. I may also invite several members of the school community to participate in a group discussion to explore views and values. Group discussions can similarly take about 45 minutes to one hour. Any observation notes that I take of school life and the Index process will not be focused in individuals, but rather the atmosphere and life of the school environment. I will take particular care to ensure the confidentiality of all data gathered for this study. I will also take care to ensure your anonymity in publications of the findings.

You have the right to withdraw from the project at any time without penalty. If you choose to withdraw, I will use my best endeavours to remove any of the information relating to you from the project, including any final publication, provided that this remains practically achievable. All raw data, such as transcripts from interviews, observations notes, etc. will be held securely and kept for a minimum period of 5 years following completion of the project and then destroyed. Any consent forms should be returned to the school office, which will then be collected by Mr. McMaster.

After my year at the school is finished and such feedback is completed, a full report or a summary of the findings of my study will be made to all participants interested in receiving a copy. In doing so the confidentiality of the school and all participants will be maintained.

My contact details, and those of my supervisor at the University of Canterbury, are given below. A 'supervisor' is a member of the academic community who guides and advises the student during their research project. My primary supervisor is Associate Professor Missy Morton at the University of Canterbury.

This application has been reviewed and approved by the University of Canterbury Educational Research Human Ethics Committee. Complaints may be addressed to The Chair, Educational Research Human Ethics Committee, University of Canterbury, Private Bag 4800, Christchurch, Email: [human-ethics@canterbury.ac.nz](mailto:human-ethics@canterbury.ac.nz)

Yours sincerely,

Chris McMaster

Chris McMaster

183 Lytton Rd.

Gisborne, 4010

0221-721-669

[Chris.mcmaster@pg.canterbury.ac.nz](mailto:Chris.mcmaster@pg.canterbury.ac.nz)

Associate Professor Dr. Missy Morton

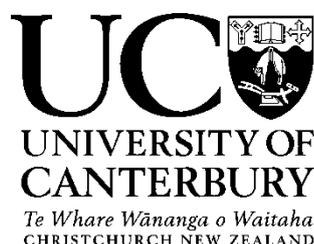
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Leadership

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03-345-3812

[missy.morton@canterbury.ac.nz](mailto:missy.morton@canterbury.ac.nz)

## Appendix 3a



Principal of Subject School

Declaration of Consent

I consent to parents/caregivers, staff and students participating in the project, *Finding a 'Shady Place': A Critical Ethnography of Developing Inclusive Culture in an Aotearoa/New Zealand School*, and the implementation of the self review programme known as the *Index for Inclusion*. I have read and understood the information provided to me concerning the research project and what will be requested of them and the school should they participate in the project. These are briefly listed here:

- Voluntary participation in interviews and focus group discussions on two to three different occasions;
- Observations of school life in a variety of locations (observations within classrooms to be negotiated with the class teacher);
- Access by the researcher to non-confidential school documents as part of 'building a picture' of the school; and
- Participation in the school wide process outlined in the *Index for Inclusion*.
- A full report or a summary of the findings of my study will be made to all participants interested in receiving a copy.

Consent from each participant will be gained individually and parents/caregivers of students involved in the study will also have completed and returned consent declarations. I understand that the information they provide to the researcher will be treated as confidential and that no findings that could identify either individuals or the school will be published. In group interview situations, participants will be asked to treat what is shared in confidence.

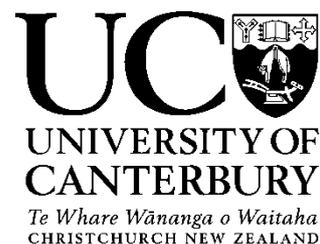
I understand that participation in the project is voluntary and that participants may withdraw from the project at any time without incurring any penalty.

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Consent forms should be returned to the school office, which will then be collected by Mr. McMaster. Should you have any queries about the consent form or the project, please do not hesitate to contact him on: 0221-721669, or arrange a meeting with him through the school.

## Appendix 3b



Board of Trustees of Subject School

Declaration of Consent

I consent to parents/caregivers, staff and students participating in the project, *Finding a 'Shady Place': A Critical Ethnography of Developing Inclusive Culture in an Aotearoa/New Zealand School*, and the implementation of the self review programme known as the *Index for Inclusion*. I have read and understood the information provided to me concerning the research project and what will be requested of them and the school should they participate in the project. These are briefly listed below:

- Voluntary participation in interviews and focus group discussions on two to three different occasions;
- Observations of school life in a variety of locations as part of the implementation of the *Index for Inclusion* (observations within classrooms to be negotiated with the class teacher);
- Access by the researcher to non-confidential school documents as part of 'building a picture' of the school, e.g. policies, past professional development, etc; and
- Participation in the school wide process outlined in the *Index for Inclusion*. Copies of the *Index for Inclusion* will be made available in pdf format.
- A full report or a summary of the findings of my study will be made to all participants interested in receiving a copy.

Consent from each participant will be gained individually and parents/caregivers of students involved in the study will also have completed and returned consent declarations. I understand that the information they provide to the researcher will be treated as confidential and that no findings that could identify either individuals or the school will be published. In group interview situations, participants will be asked to treat what is shared in confidence.

I understand that participation in the project is voluntary and that participants may withdraw from the project at any time without incurring any penalty.

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Consent forms should be returned to the school office, which will then be collected by Mr. McMaster. Should you have any queries about the consent form or the project, please do not hesitate to contact him on: 0221-721669, or arrange a meeting with him through the school.

## Appendix 3c



### Staff Declaration of Consent

I consent to participate in the project, *Finding a 'Shady Place': A Critical Ethnography of Developing Inclusive Culture in an Aotearoa/New Zealand School*, and the implementation of the self review programme known as the *Index for Inclusion*. I have read and understood the information provided to me concerning the research project and what will be required of me should I participate in the project.

- Participating in interviews with the research (up to two or three occasions throughout the academic year, as negotiated with the researcher). Interview transcripts will be available for you to review, add or delete from.
- Participant Observations in the classroom. These are non-obtrusive and designed to minimise any disruption to the lesson. Any observation notes will be taken after visiting the classroom and can be reviewed by you if you wish. Any participant observations taking place in your classroom will only be undertaken with your consent and after negotiation with you.
- Participating in the school wide development project, the *Index for Inclusion*. A copy of the *Index* can be provided to you in pdf format.
- Non-invasive observations of school life during the *Index for Inclusion* process

I understand that the information provided to the researcher will be treated as confidential and that no findings that could identify me or my school will be published. In group interview situations, participants will be asked to treat what is shared in confidence.

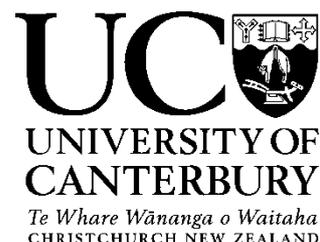
I understand that participation in the project is voluntary and that participants may withdraw from the project at any time.

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Consent forms should be returned to the school office, which will then be collected by Mr. McMaster. Should you have any queries about the consent form or the project, please do not hesitate to contact him on: 0221-721669, or arrange a meeting with him through the school.

## Appendix 3d



### Parent/Caregiver Declaration of Consent

I consent to (student's name) \_\_\_\_\_ participating in the project, *Finding a 'Shady Place': A Critical Ethnography of Developing Inclusive Culture in an Aotearoa/New Zealand School*, and the implementation of the school development programme known as the *Index for Inclusion*. I have read and understood the information provided to me concerning the research project and what will be required of participants should they wish to participate in the project, such as:

- Voluntary participation in focus group discussions consisting of 4 to 8 students where topics of school life and inclusion can be discussed and explored; and
- Work with the researcher on school based activities associated with the *Index* process at the school location.

I understand that the information provided to the researcher will be treated as confidential and that no findings that could identify either individuals or the school will be published.

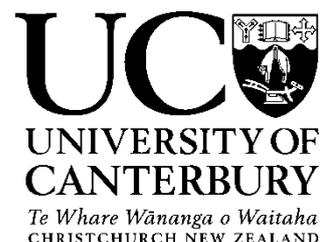
I am aware that as part of his research on the *Index* process in the school the researcher will be keeping a record of his observations. Any notes taken will be kept securely and only shared with his academic supervisors. This data will be analysed as part of his doctoral thesis. The researcher will report his findings to the school community in a manner negotiated with the school community.

I understand that participation in the project is voluntary and that participants may withdraw from the project at any time without incurring any penalty. I understand that I (as parent/caregiver) may be asked at some point to be interviewed or take part in a focus group discussion. In group interview situations, participants will be asked to treat what is shared in confidence. I have the right to say no, and if I participate I will be able to see any transcript of the interview or discussion and be able to add or delete to parts relating to myself.

Name: \_\_\_\_\_ Date: \_\_\_\_\_  
Signature: \_\_\_\_\_

Consent forms should be returned to the school office, which will then be collected by Mr. McMaster. Should you have any queries about the consent form or the project, please do not hesitate to contact him on: 0221-721669, or arrange a meeting with him through the school.

## Appendix 3e



Student

Declaration of Consent

I consent to participate in the project, *Finding a 'Shady Place': A Critical Ethnography of Developing Inclusive Culture in an Aotearoa/New Zealand School*, and the whole school project known as the *Index for Inclusion*. The *Index for Inclusion* has been used in many countries around the world as a way to make schools a better place not only for teachers, but for students and their family. It is essentially about making school a more welcoming and safe place for everybody.

I have read and understood the information concerning the research project and what will be required of me should I participate in the project.

I understand that the researcher, who will be working or volunteering in the school for the duration of the year, will take notes about what he sees in the school regarding the *Index* process. This is because he wants to find out how we can best develop more welcoming and safe schools in New Zealand.

I understand that anything I tell the researcher during an interview or group discussion will be kept private and that in any notes or write up pretend names will be used so nobody will be able to identify who participated. This means any participation will be *confidential*. In group interview situations, participants will be asked to treat what is shared in confidence.

I understand that my participation in the project is voluntary and that I can withdraw from the project at any time. I can ask to see any transcripts of what I have said in any interview or group discussion, and if I am unhappy with what has been recorded I can ask for it to be changed or deleted.

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Consent forms should be returned to the school office, which will then be collected by Mr. McMaster. Should you have any queries about the consent form or the project, please do not hesitate to contact him on: 0221-721669, or arrange a meeting with him through the school.

## Appendix 4: Index student questionnaire

### Our School: What do you think?

Your views are important—please use this questionnaire to let us know what you think is important and what you would like to see

		Agree	Agree and disagree	Disagree	Need more info
1	I look forward to coming to school				
2	The school and the grounds look attractive.				
3	The toilets are clean.				
4	The students get on well together.				
5	I have some good friends.				
6	I like my teachers.				
7	The school helps me to feel good about myself.				
8	The school helps me to feel good about the future.				
9	We are encouraged to stand up for what we believe is right.				
10	It's good to have students from different backgrounds.				
11	Just by being at the school you learn how to get on with people.				
12	I have learnt how my actions affect others in the school.				
13	I have learnt how my values affect the way I act.				
14	My family feel involved in what goes on at the school.				
15	When teachers say they are going to do something they do it.				
16	People admit when they have made a mistake.				
17	There is a comfortable place inside the school I can go to at lunchtimes.				
18	I have been involved in making the school a better place.				
19	Any student who lives near to this school is welcome to come here.				
20	When I first came to the school I was helped to settle in.				
21	You are respected regardless of the colour of your skin.				
22	You feel equal part of the school whatever your religion or if you have no religion.				
23	Boys and girls get on well together.				
24	It is OK to be myself in school, who ever I am and however I choose to be.				
25	Disabled students are respected and accepted.				
26	Students avoid calling each other hurtful names.				
27	If anyone bullied me or anyone else, I would tell a teacher.				

28	Teachers do not have favourites among the students.				
29	If I have been away for a day a teacher wants to know where I have been.				
30	I think the teachers are fair when they praise a student.				
31	I think the teachers are fair when they discipline a student				
32	Teachers know how to stop students interrupting lessons.				
33	We learn how to settle disagreements by listening, talking and compromise.				
34	In lessons students often help each other in pairs and small groups.				
35	In lessons students share what they know with other students.				
36	If I have a problem in a lesson, a teacher or teaching assistant will help me.				
37	I enjoy most of my lessons.				
38	I learn about what is going on in the world.				
39	I have learnt about the importance of human rights.				
40	I learn how suffering in the world can be reduced.				
41	At times students are trusted to learn on their own.				
42	We learn how to save energy at the school.				
43	We learn to care for the environment in the school and the area around it.				
44	When teaching assistants are in the classroom they help anyone who needs it.				
45	Teachers are interested in listening to my ideas.				
46	Students are interested in listening to each other's ideas.				
47	In lessons I always know what to get on with next.				
48	I am aware when I have done good work.				
49	Teachers don't mind if I make mistakes in my work as long as I try my best.				
50	When I am given homework I usually understand what I have to do.				
51	I find that homework helps me to learn.				
52	There are enough afterschool or lunch clubs and sports to do.				

**These are the three things I like best about my school:**

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

**These are the three things I would most like to improve about this school—what would make [school name] a better place:**

**1** \_\_\_\_\_

**2** \_\_\_\_\_

**3** \_\_\_\_\_

## Appendix 5: Student Council Work Group

17 June, 2013

### Analysing student questionnaires

Today a work group met to analyse the student questionnaires that have been returned. There were over 250 completed questionnaires. The 20 students from student council worked in groups of 3 to 5 looking at the questionnaires.

The groups first looked at the questionnaires and made note of significant items, such as repeated questions that were answered with 'disagree' as well as comments from page two of the questionnaires. These were written down on A3 paper.

Next all the groups came together and identified themes which emerged from the various answers. These came quite easily and from all tables and were discussed in the next step.

The third step of analysis the working party had a quick brainstorm of possible action with each themed area. These are below:

**Toilets:** punishment; monitors; more facilities; campaign for hygiene; soap/hand sanitisers; locks that function

**Student awareness:** notices more comprehensive; frequent newsletters; notice boards; assemblies more often

**Lunch time activities:** sports room more available/accessible; gym open; interaction between students

**Common area:** looking after areas; opening classrooms during breaks; use of the hall during breaks; planning H Block area

**Favouritism/behaviour:** harsher consequences; classroom over lookers; monitoring; warning system; communication to teachers

**Uniform:** long pants in winter; better skirts/kept to length; white uniform permitted; jackets during rain; hats rule re-considered

The working group was not able to discuss **cafe—prices and eftpos** and **Drama back!** As time was running short. It is hoped that this information will inform the full student council and give future focus groups/working parties good places to start.

XXXX, XXXXX, XXXXXX, XXXX and XXXXXXX have volunteered to be points of contact from the working group and take the information forward to a full student council and the creation of 'sub-committees' to plan proactively.

Staff Present/facilitating: Mr. McMaster and Ms. XXXX

## Appendix 6: Staff Questionnaire 1: Indicators (results from whole staff survey n:38)

Dimension A - Creating inclusive cultures			Agree	Agree & disagree	Disagree	Need more information
A1: Building community	1	Everyone is welcomed	33	5	0	0
	2	Staff co-operate.	18	18	0	0
	3	Students help each other.	16	23	0	0
	4	Staff and students respect one another.	14	24	0	0
	5	Staff and parents/carers collaborate.	6	28	4	1
	6	Staff and BOT work well together.	12	14	0	12
	7	The school is a model of democratic citizenship.	11	20	4	3
	8	The school encourages an understanding of the interconnections of people around the world	10	15	2	9
	9	Adults and students are responsive to a variety of ways of being a gender.	8	21	1	9
	10	The school and local communities develop each other.	8	18	4	5
	11	Staff link what happens at school to student's lives at home.	12	19	2	4
A2: Establishing inclusive values	1	The school develops shared inclusive values.	19	10	2	5
	2	The school encourages respect for all human rights.	22	4	0	4
	3	The school encourages respect for the integrity of the planet earth.	13	13	1	3
	4	Inclusion is viewed as increasing participation for all.	23	6	0	8
	5	Expectations are high for all students.	19	17	1	1

6	Students are valued equally.	18	17	2	2
7	The school counters all forms of discrimination.	13	15	8	2
8	The school promotes non-violent interactions and resolutions to disputes.	31	4	0	1
9	The school encourages students and adults to feel good about themselves.	27	9	0	2
10	The school contributes to the health of students and adults.	31	7	0	0

<b>Dimension B - Producing inclusive policies</b>			Agree	Agree & disagree	Disagree	Need more information
B1: Developing the school for all	1	The school has a participatory development process.	12	4	1	17
	2	The school has an inclusive approach to leadership.	13	5	0	6
	3	Appointments and promotions are fair.	16	9	3	10
	4	Staff expertise is known and used.	17	17	2	1
	5	All new staff are helped to settle into the school.	16	17	3	1
	6	The school seeks to admit all students from its locality.	25	7	0	6
	7	All new students are helped to settle into the school.	31	4	0	2
	8	Teaching and learning groups are arranged fairly to support all students' learning.	11	23	4	4
	9	Students are well prepared for moving on to other settings.	7	28	1	4
	10	The school makes its buildings accessible to all people.	11	9	14	1
	11	The buildings and grounds are developed to support the participation of all.	11	16	8	3
	12	The school reduces its carbon footprint and use of water.	2	4	18	13
	13	The school contributes to the reduction of waste.	4	10	15	6
B2: Organising support for	1	All forms of support are coordinated.	2	16	12	6
	2	Professional development activities help staff respond to diversity.	10	20	4	2
	3	English as an additional language support is a resource for the whole school.	10	6	13	7
	4	The school supports continuity in the education of students in public care.	11	9	0	18

5	The school ensures that policies about 'special educational needs' supports inclusion.	9	9	6	14
6	The behaviour policy is linked to learning and curriculum development.	7	12	3	17
7	Pressures for disciplinary exclusion are decreased.	17	9	0	12
8	Barriers to attendance are reduced.	15	14	3	8
9	Bullying is minimised.	15	18	2	5

		Agree	Agree & disagree	Disagree	Need more information	
<b>Dimension C - Evolving inclusive practices</b>						
C1: Constructing curricula for all	1	Students explore cycles of food production and consumption.	6	8	2	22
	2	Students investigate the importance of water.	6	8	2	20
	3	Students study clothing and decoration of the body.	7	13	1	18
	4	Students find out about housing and the built environment.	9	10	1	19
	5	Students consider how and why people move around their locality and the world.	8	11	1	18
	6	Students learn about health and relationships.	25	8	0	5
	7	Students investigate the earth, the solar system and the universe.	22	7	0	10
	8	Students study life on earth.	21	7	0	10
	9	Students investigate sources of energy.	15	8	0	14
	10	Students learn about communication and communication technology.	21	9	0	9
	11	Students engage with, and create, literature, arts and music.	23	6	1	8
	12	Students learn about work and link it to the development of their interests.	17	12	0	8
	13	Students learn about ethics, power and government.	5	13	0	19
C2: Orchestrating learning	1	Learning activities are planned with all students in mind.	19	17	2	2
	2	Learning activities encourage the participation of all students.	22	14	1	1
	3	Students are encouraged to be confident and critical thinkers.	22	15	0	1
	4	Students are actively involved in their own learning.	19	18	0	1
	5	Students learn from each other.	31	5	0	1

6	Lessons develop an understanding of the similarities and differences between people.	16	14	2	7
7	Assessments encourage the achievements of all students.	19	13	3	3
8	Discipline is based on mutual respect.	24	11	0	3
9	Staff plan, teach and review together.	12	23	0	3
10	Staff develop shared resources to support learning.	16	21	1	1
11	Teaching assistants support the learning and participation of all children.	13	13	1	10
12	Homework is set so that it contributes to every student's learning.	5	18	6	7
13	Activities outside formal lessons are made available for all students.	22	7	2	4
14	Resources in the locality of the school are known and used.	9	21	2	4

## Appendix 7: Ideas for inclusion (themed)

### Systemic

- More PD for staff—easily available, More group work in PD
- More group work in staff meetings
- More group work in classes/subjects
- More staff involvement and feedback in decision making
- Continuation of grouped school activities/student stuff
- Being open to choice—offer/include/attempt to include, but also acknowledge that they may not want to do something/an activity and that's OK
- Create a 'centre for understanding—symbolically? Physically?
  
- Heterogeneous classrooms
- Whole school team planning
- Whole school implementation of: reciprocal teaching; learning logs; teacher and student goals; solo taxonomy
- Departments handling 'in house'
- Not being sent out of class
- Whanau included in school
- Teachers open to allow different learning styles
- Get to know all BOT members

### Social/cultural

- Greater collaboration with community/whanau—collect their voice more alongside student voice
- More whanau times to exhibit student work
- More celebrations of positives (not formal)
- Involve students in the process
- Raise profile of least represented ethnicities, e.g. Pacifica, Indian, etc.
- Combine mass singing and haka
  
- School socials
- Entertainers from other places/countries
- Social events for staff; More social events for teachers to lift morale
- Understanding and learning from other cultures and languages
- Being able to celebrate success at all levels no matter how big or small
- Use of community more
- Emphasise multicultural

- Teacher swap with say Tonga (Tongan teacher with us) for 1-2 years
- Celebrate diversity More support for Pacific island students;
- Support for Tonga students (culture)

#### Special needs/additional needs

- DAU—some mainstream opportunities
- Gifted and talented—need their needs catered for
- Improve chain of responsibility for special conditions
- Help the Tongans!!
- Specific ESOL education/orientation
- Mentors for challenging kids—either adults or other pupils
- Focus on at-risk students when planning for inclusion ///; Focus on the most vulnerable; Focus on at risk students

#### Learning about inclusion

- Need to see an active working model before I offer an informed opinion; Look at others have done to ‘create inclusive cultures’
- Publish and make explicit the ‘language of inclusivity’ and begin to use those words in our school
- Raise awareness within staff on what inclusion is

#### Technology

- Open internet
- Better technology at times

## Appendix 8: Example of fieldnotes/coding and initial analysis

special needs → reduces "Value of Worth"

quickly agreed. Extension means higher value—meeting higher levels of NCEA makes the school look good. This was part of her mentioning [redacted] students—an awareness of their reduced 'value' as [redacted] students. She would like to address this mind set. — type of person attached to (Index Process)

[redacted] talked about how in [redacted] they try to make the subject more inclusive by having mixed years, such as 11, 12, and 13 in the same class. This means they have numerous groups working on numerous credits/standards. They tried individually but found it too much within a single class—lots of work then collapsing from exhaustion. This way they have found students grouping around a work topic. Their take on what they want to create is the class as a safe place to learn. That is why she likes options teaching—getting a mix of students and being able to focus on parts of the student outside credit accumulation. They are still working this out—how to continue with this model and increase scores.

[redacted] felt the Index process could be way to tackle the attitudes around extension. She felt that here it would be dialogic, but how to initiate that dialogue? [redacted] felt that creating another system around [redacted] and [redacted] would be more easy to achieve than dissolving extension in to the mainstream. She has high regard for [redacted] and mentioned how [redacted] has moved from being a 'behaviour unit with brown faces' into a more positive model of learning support. Interesting how [redacted] and [redacted] have also been thinking about how to look at the system. It seems to be identified as an area for potential work. But then again we are back to that busy thing.

Saw [redacted] at the [redacted] with his Spec book in hand. He doesn't seem to do any anymore and says he is bored. He said he wanted to do PE and walked that way, but ended up in art with his unit mates. Saw him again leaving [redacted] right at lunch, said he wasn't hungry and wanted to spend lunch with his old friends.

During the whole session I spent with [redacted] and [redacted]. He wandered into the Library where I was looking briefly at the newspaper. He had a green flag and waved it—he went to the stock cars on the weekend. He was talking quietly as well—yes, he is capable of learning. He left the library and as I walked towards art just to see if [redacted] was there [redacted] passed and drafted me into flag waver for the rest of the session. He was running around whatever circuit he could invent, instructing [redacted] and I how to act properly in our role. [redacted] said he has no programme and he is just inventing his own. He went to [redacted] for a short time but left. [redacted] said his caregiver wanted him to go there so he will get some learning. This is not working out as there is no programme, no goals, no learning objectives set for him.

[redacted] took us over to the gym where there is a balcony for the flag waver. He then went to covered area. Students are becoming more familiar with him, and return hugs or resist a hug. He will become a pet if left to act this way—roaming wherever, tailed by a playmate/supervisor. I found myself asking (in my head): why is he at school? This is just 'day care'. There is no education being offered. The feeling is that he is not educable. AND—what is this going to be like when he is Year 10? Or 11?

[redacted] said she has never seen his IEP and that it would probably be unhelpful as it would just say he can do things he can't. I said, maybe it would have some strategies...but I don't think she is too hopeful about that. She said students from his old school said he was allowed to make noise and

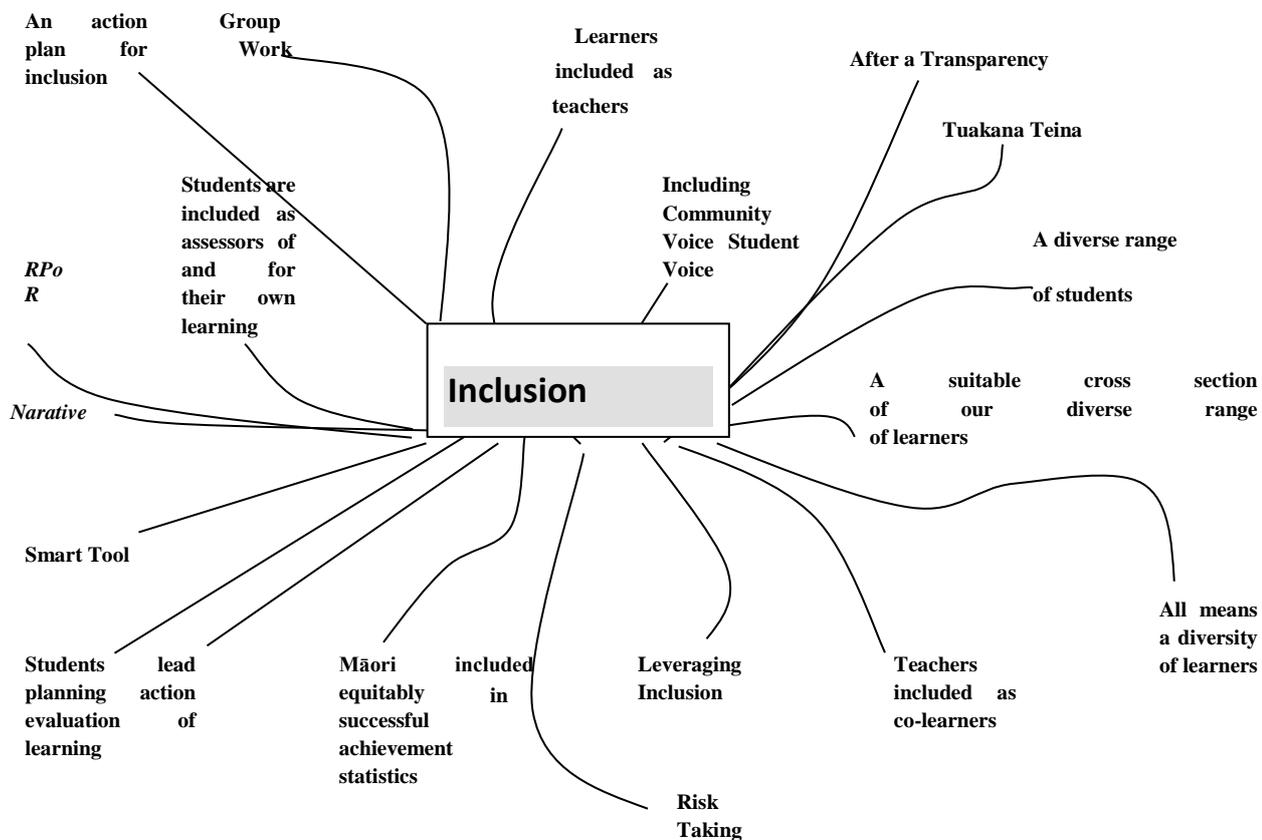
A Safe place to Learn

*Handwritten notes and annotations:*

- Process
- Index Process
- Student selected learning
- Index = individual about extension
- Moving
- Bored
- left in the [redacted]
- Conductant to TA
- recognizes that none to the place in [redacted]
- Student familiar (PET)
- Need for IEP

## Appendix 9: Staff Meeting Initial planning and brainstorm

### Community Inclusive



### Better Communication: Celebration

